

PERIscope2013



Swedish

Consumers & Their Food



Introduction

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- PERIscope 2013 explores consumer behaviours & attitudes towards food, shopping and cooking.
- Online survey conducted amongst 1,000 adults aged 18+ in Sweden.
- Results are also available across nine other countries.
- Survey covers topics such as: Eating at home, attitudes towards cooking, local food, sustainability, the environment, grocery shopping and health & wellbeing.
- Research carried out by Ipsos MRBI.
 - *Please note, there may be discrepancies in relation to some of the 'total' figures within this report. This is due to rounding (e.g. "slightly agree" at 45, "strongly agree" at 30, "agree" at 76).*
- For further information or queries please visit www.bordbia.ie or email info@bordbia.ie

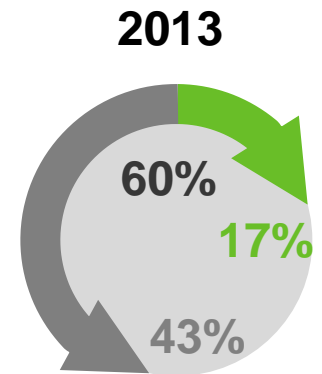
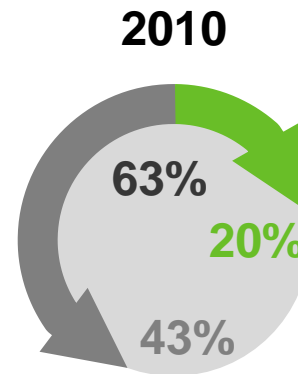
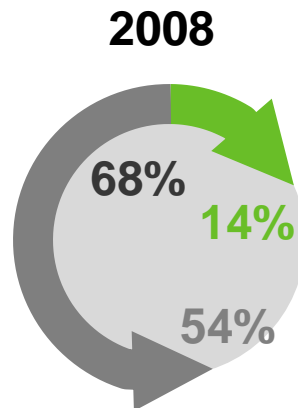
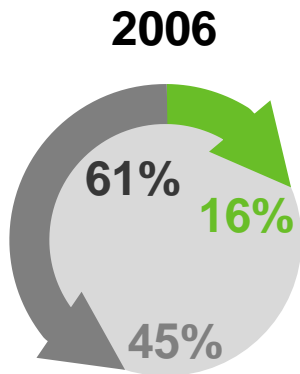
A Foodie World



Positivity about cooking remains strong in Sweden but there has been a decline compared to 2008. The proportion who are passionate about food has declined the most.

4

■ Good Fun ■ A Passion

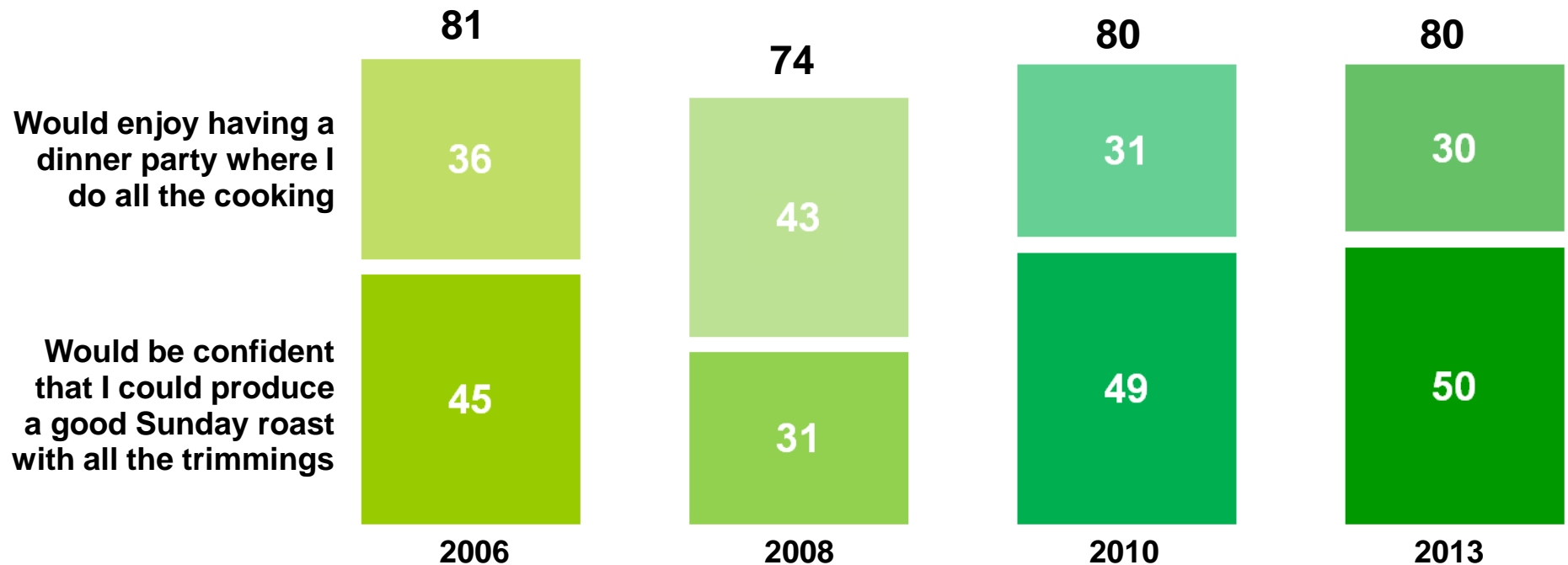


When it comes to cooking, Sweden is the second most positive country about cooking. Its passion ranks 2nd behind Germany.

The level of cooking expertise in Sweden is very strong with eight in ten claiming to be either capable of hosting a dinner party or producing a meal with all the trimmings.

5

Level of cooking expertise - Sweden



The level of cooking expertise, defined by dinner party hosting and ability to produce a meal with all the trimmings, is highest in Sweden.

Scratch cooking levels are showing signs of stabilising. Since 2008, scratch cooking has maintained an improved level of activity.

6

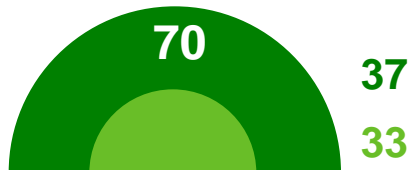


% preparing a meal from scratch once/ few times a day

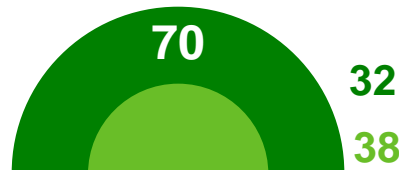


% preparing a meal from scratch few times a week

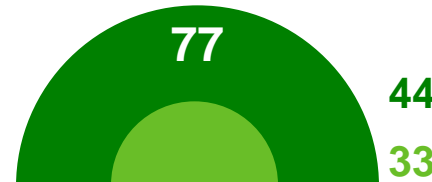
2006



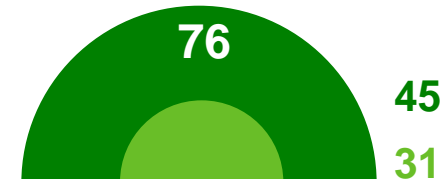
2008



2010



2013

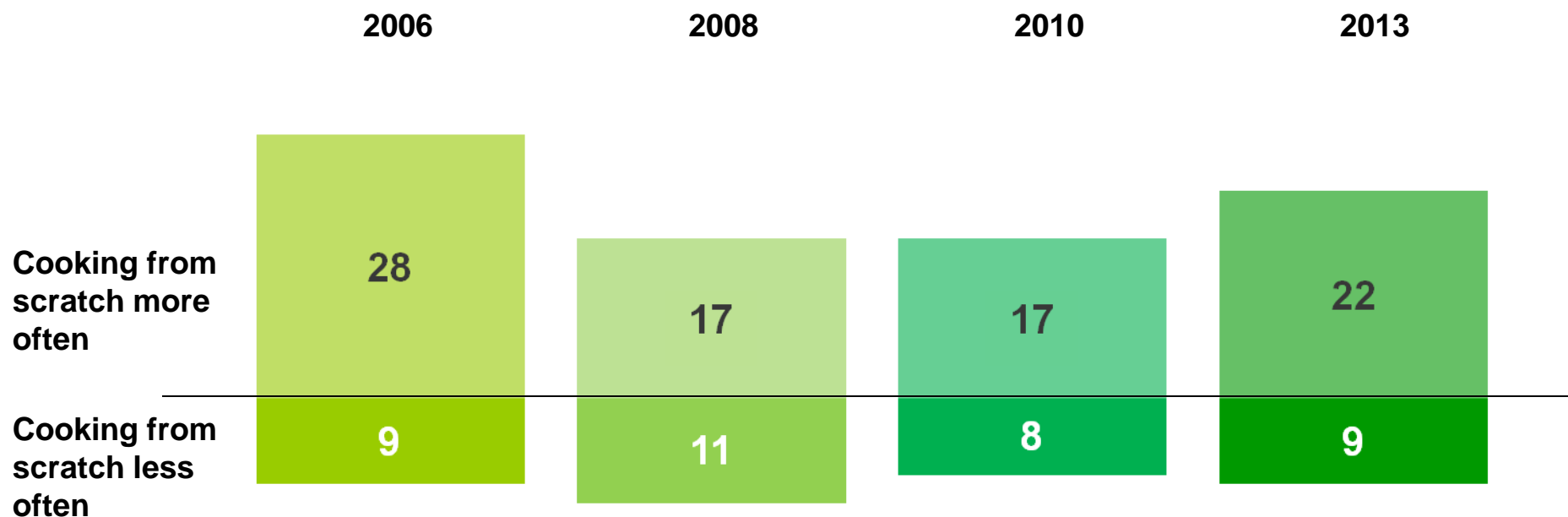


Compared to other countries in this study, Sweden ranks joint 4th, along with France, for scratch cooking.

The percentage of people claiming to be cooking from scratch more often is continuing to show signs of growth in Sweden.

7

Frequency of cooking meals from scratch more often or less often compared to 12 months ago

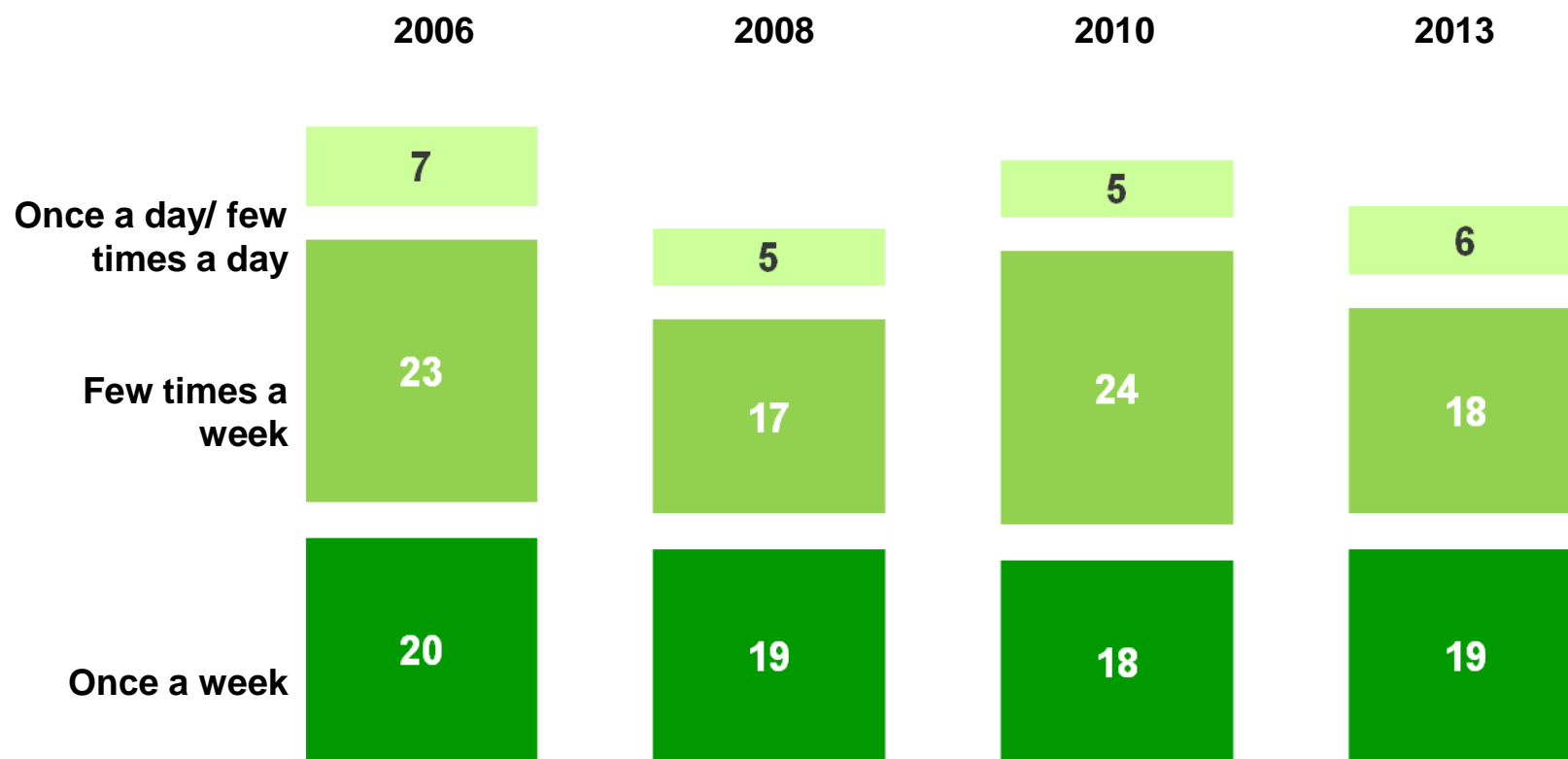


Compared to all other countries, the Swedes rank as the second highest country for increasing their scratch cooking levels, behind Spain (39%).

The use of ready prepared ingredients has fallen slightly since 2010. Overall, usage of these components on a daily/weekly basis is done by just over 4 in ten adults.

8

Use of ready prepared ingredients



The use of ready prepared ingredients on a daily/ weekly basis is highest in the US, NZ and GB. Sweden ranks joint seventh.

Taking cooking classes in the Sweden has fallen slightly. The proportion of people entertaining at home more often now stands at about one quarter of all adults.

9

**% who have attended/taken
cooking classes in the past
three years**

2013

7

2010

10

**% who are entertaining
at home more often
nowadays**

26

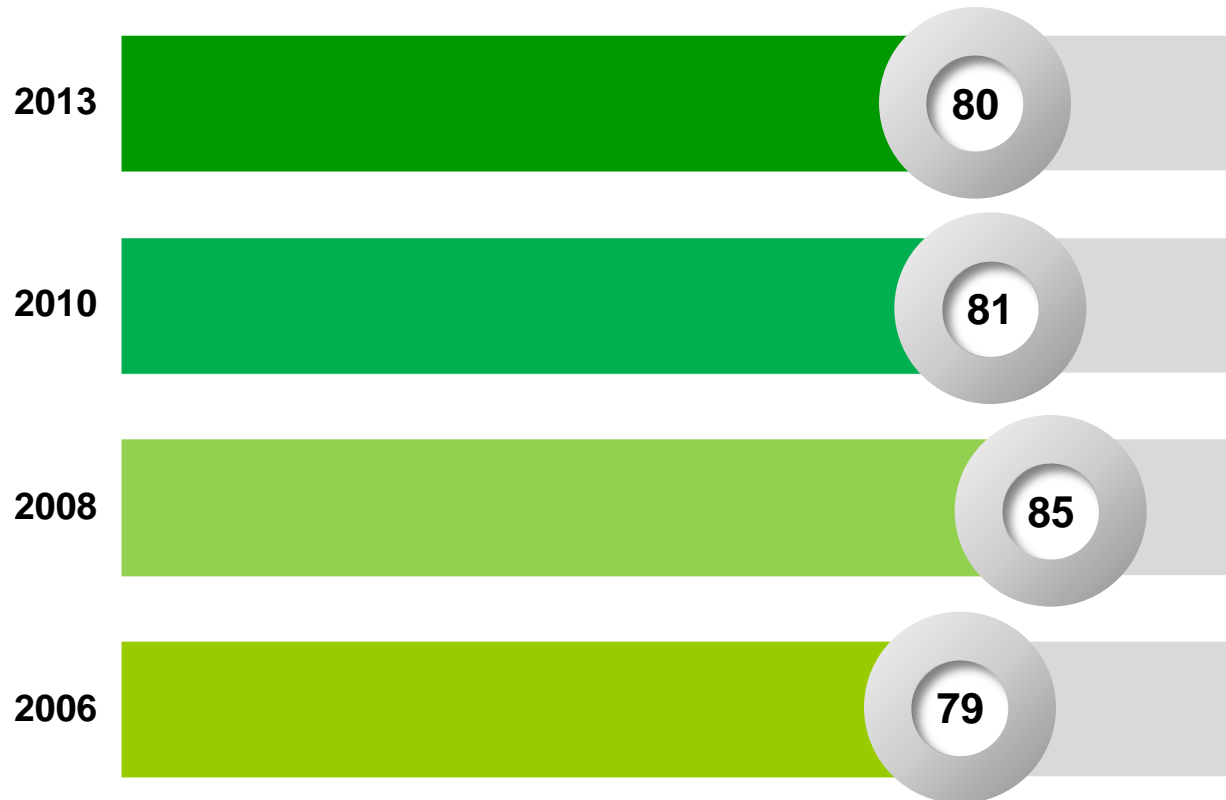
28

Attendance of cooking classes by Swedish adults is similar to countries like Germany, the Netherlands and the US. In relation to the proportion of people entertaining at home more often, Sweden ranks in the bottom two.

Eight in ten Swedish adults claim to get enjoyment from the ability to cook and create a great meal, a slight decline on 2008 results.

10

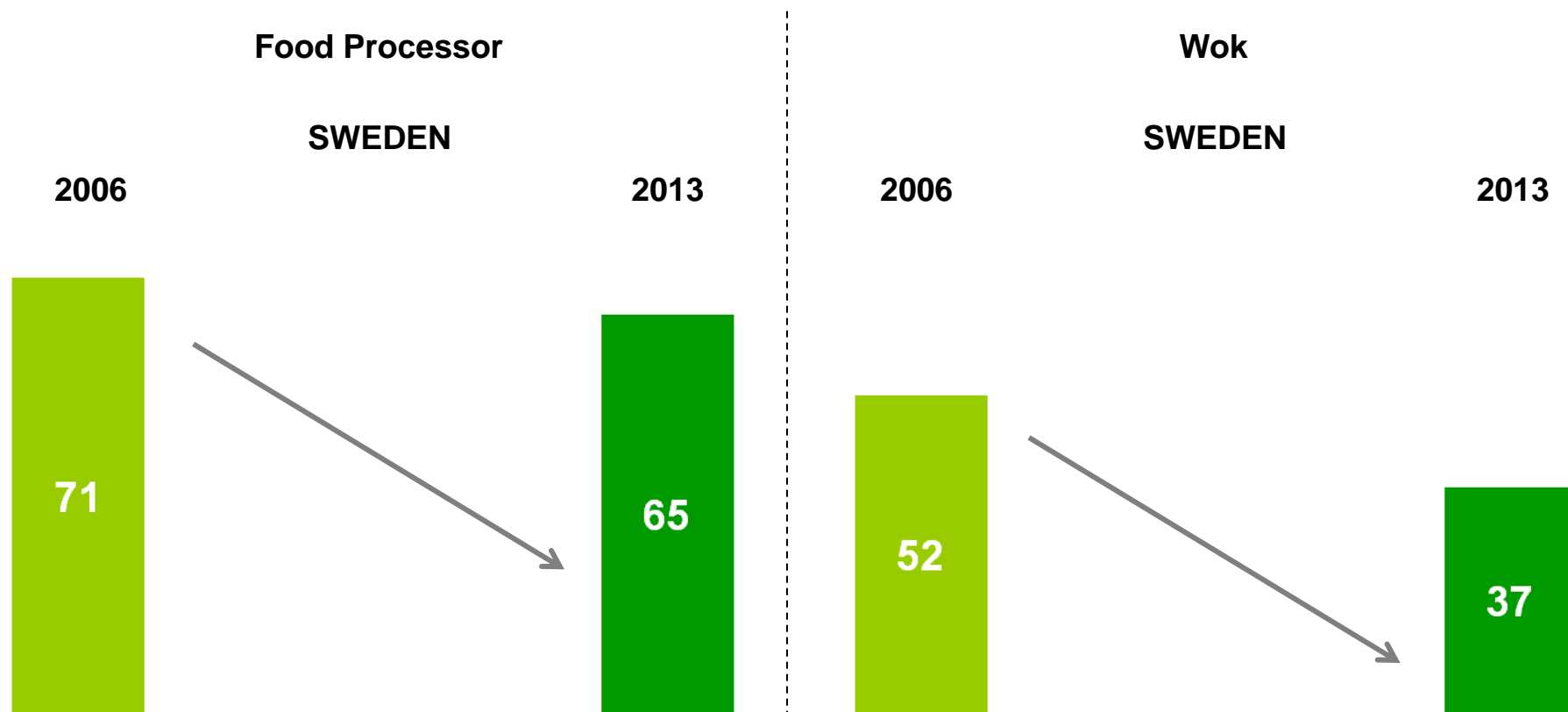
% applies that they *'enjoy cooking and being able to create a great meal'*



Sweden ranks in fifth place for enjoyment experienced as a result of creating a great meal.

In Sweden, ownership of food processors and woks have both decreased since 2006.

11



Despite the decline in food processor ownership, Sweden ranks as having the highest ownership levels. It ranks in sixth place.

Since 2010 there has been a slight decline in the proportion of Swedes who select food products that are easy to prepare and/or quick to cook.

12

%
Applies
SWEDEN

2006

2008

2010

2013

*I tend to pick
foods that are
easy to prepare*

82

85

86

80

*I tend to pick
foods that are
quick to cook*

82

82

81

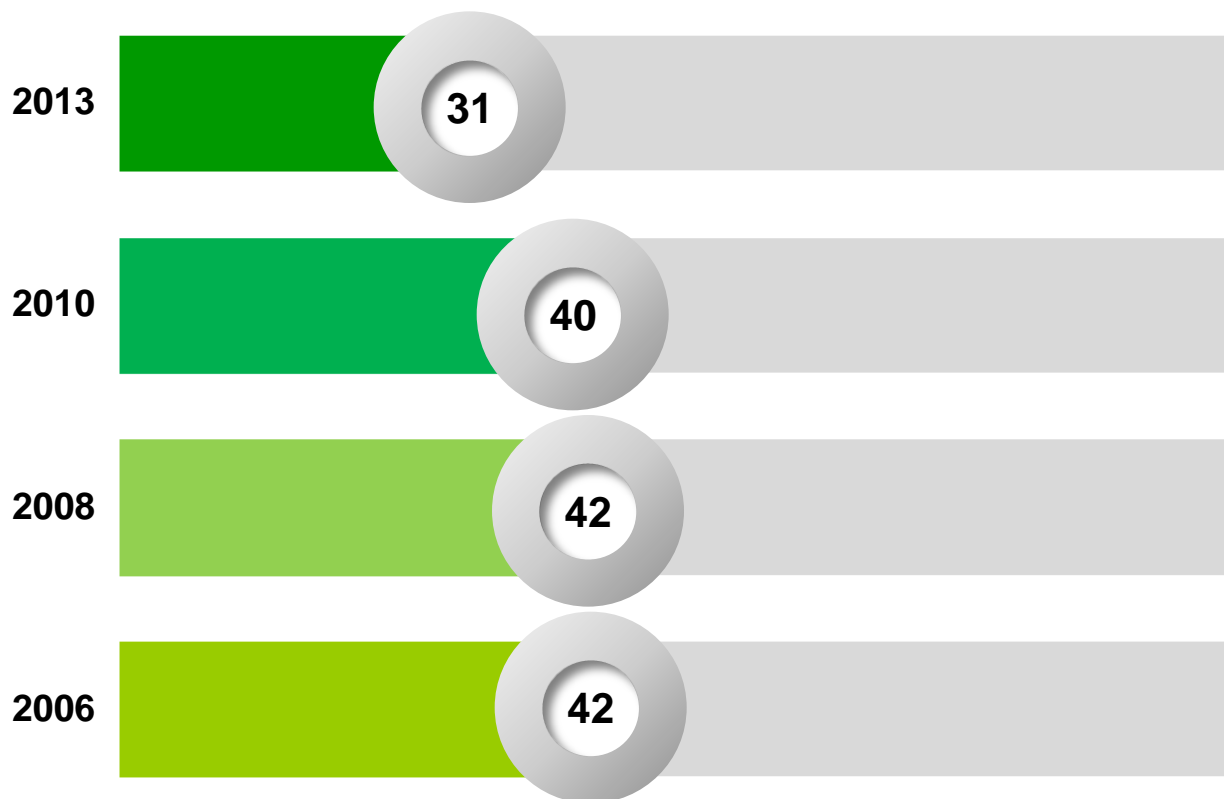
76

Compared to other countries, Sweden ranks fourth for likelihood to pick foods that are easy to prepare and fifth for picking foods that are quick to cook.

Use of ready to eat foods in Swedish households has seen a marked decline in 2013, and now represents only three in ten Swedish adults.

13

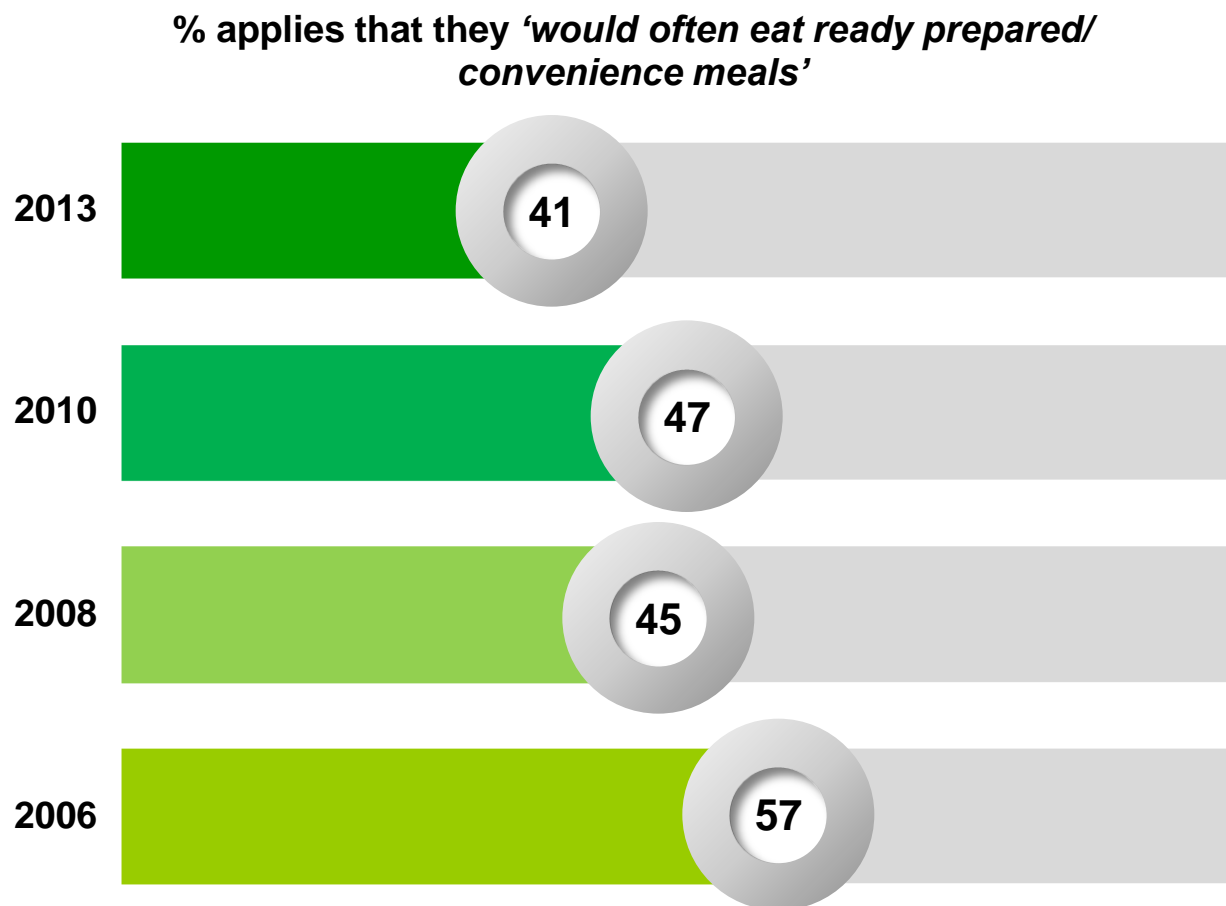
% applies 'we use a lot of ready to eat foods in our household'



Sweden is the country that has the lowest level of claimed usage of ready to eat foods in their households.

The proportion of Swedish adults claiming to often eat ready/prepared/convenience meals has declined considerably since 2006.

14

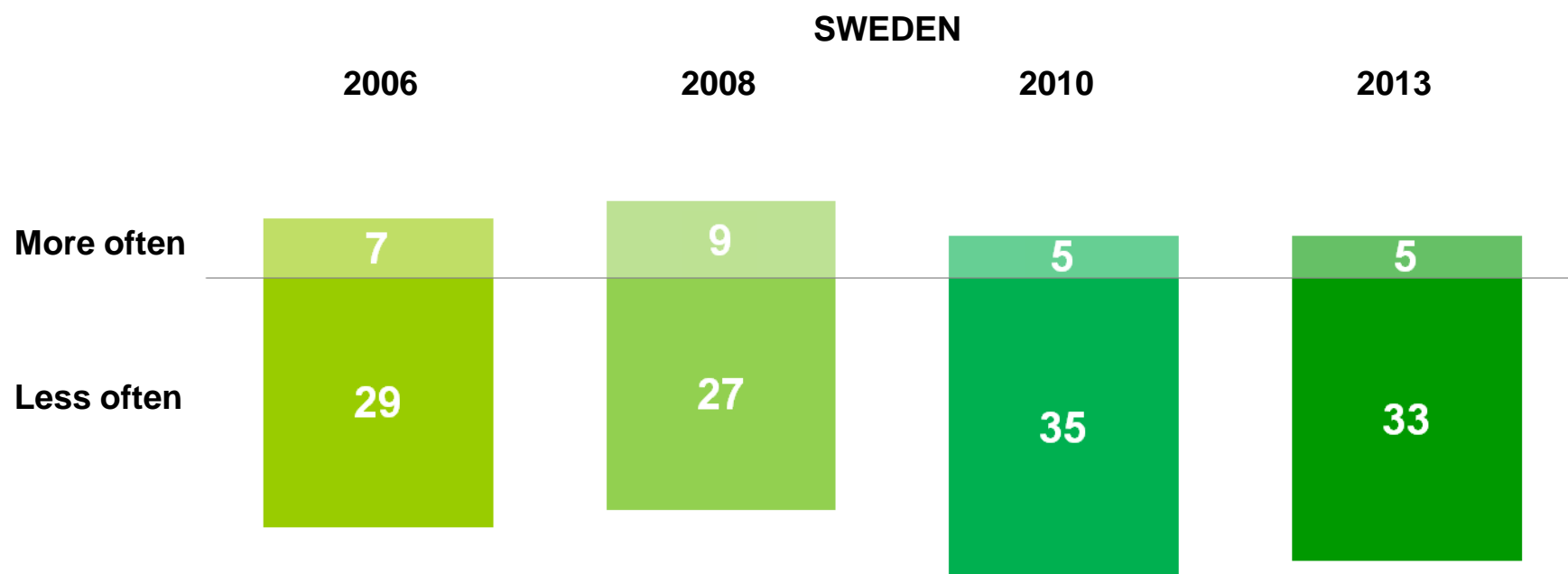


Sweden, Belgium (41%) and the Netherlands (42%) rank as bottom three countries for often eating ready prepared/ convenience meals.

The proportion claiming to eat convenience meals less often continues to be just over three in ten, an improvement on 2006 and 2008 levels.

15

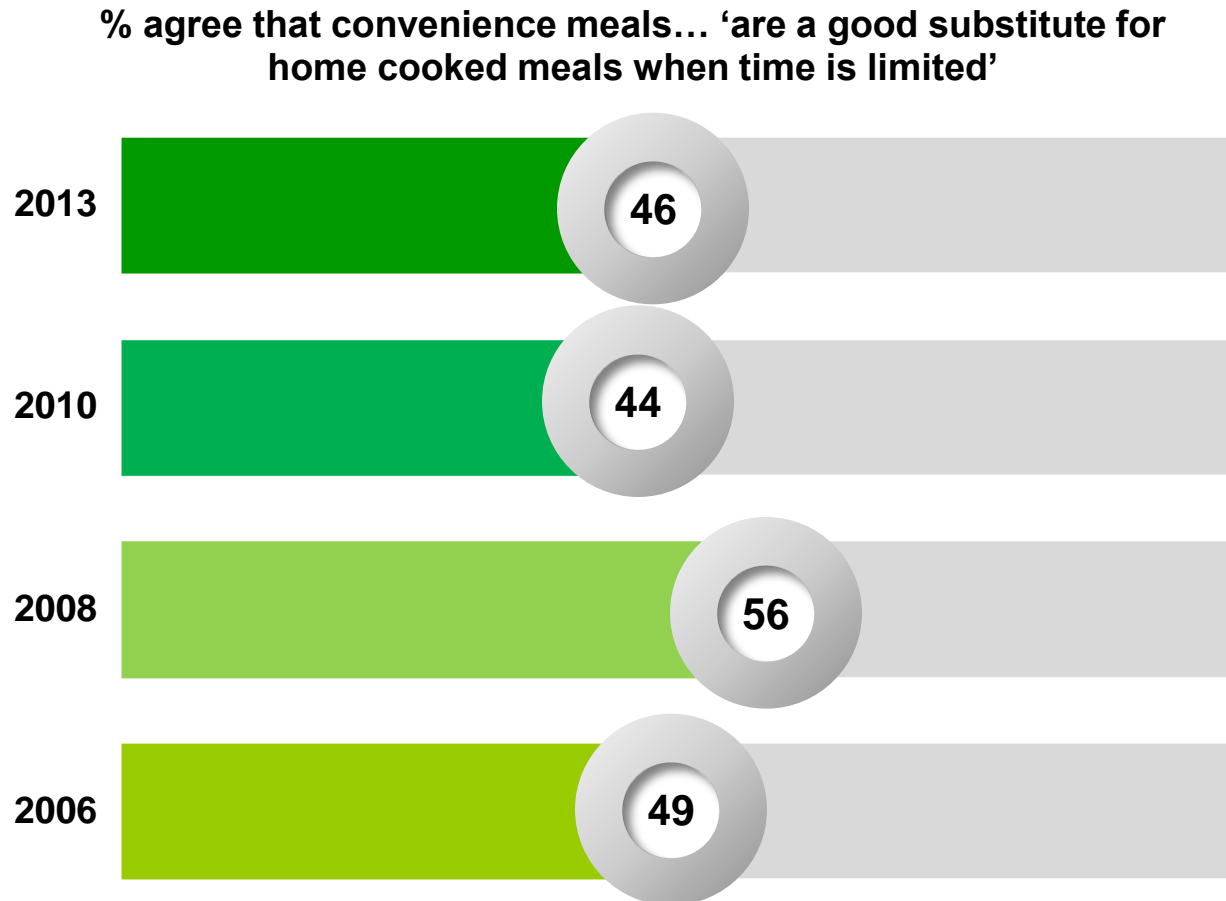
**% eating ready meals/ convenience meals more/less often than
12 months ago**



Sweden is similar to most other countries in its claims about eating convenience meals less often.

The perception of convenience meals being a good substitute for home cooked meals has fallen by ten percentage points since 2008.

16

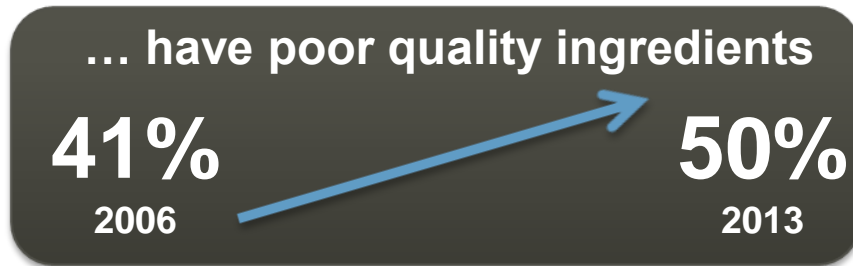


Agreement that convenience meals are a good substitute for home cooked meals when time is limited is a relatively unpopular concept in Sweden, with the country ranking seventh out of ten countries.

Negativity about convenience foods has increased amongst Swedish adults since 2006. People seem to be more negative about ingredients and taste attributes specifically.

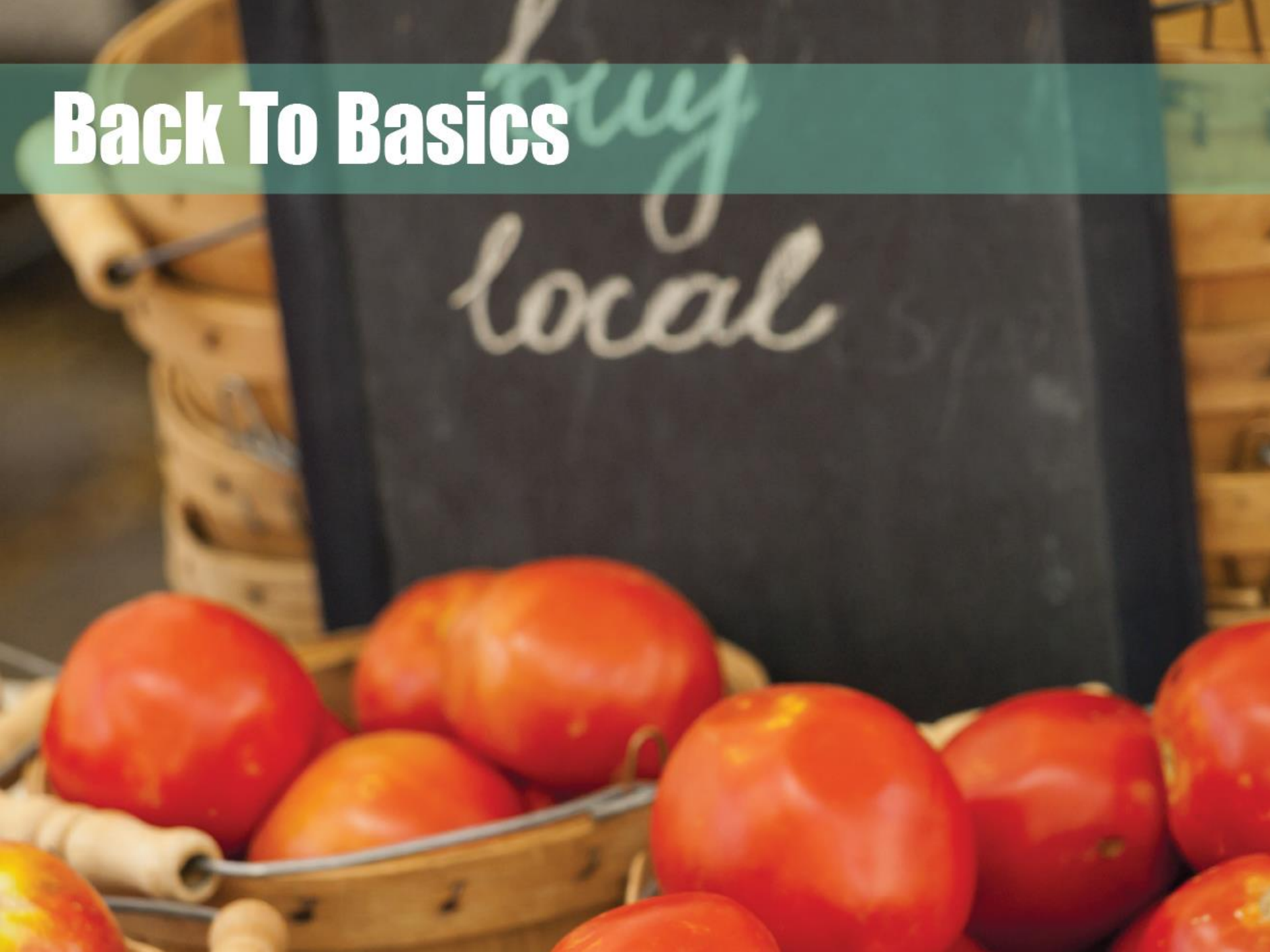
17

In Sweden, convenience foods.....



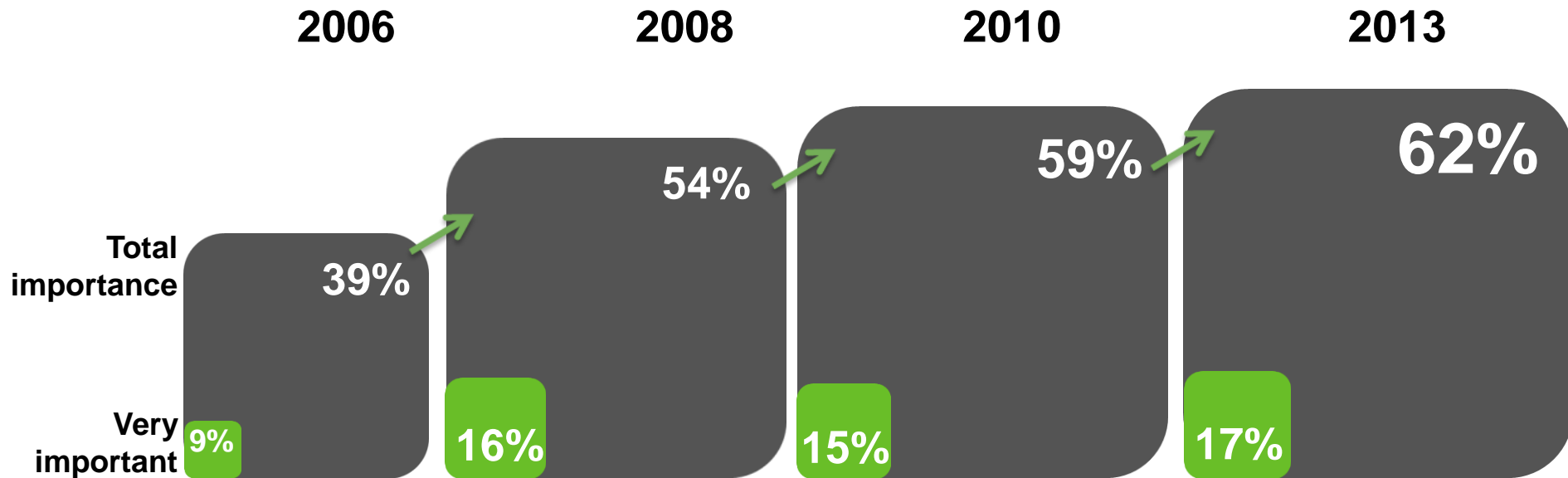
Sweden displays the lowest level of support for convenience meals being good value for money. With fifty per cent agreement, it ranks second highest in its belief that these products have poor quality ingredients.

Back To Basics



The importance placed on buying local produce has risen significantly since 2006, with the proportion of those considering it to be 'very important' almost doubling in this time. ¹⁹

Importance of buying local produce when shopping

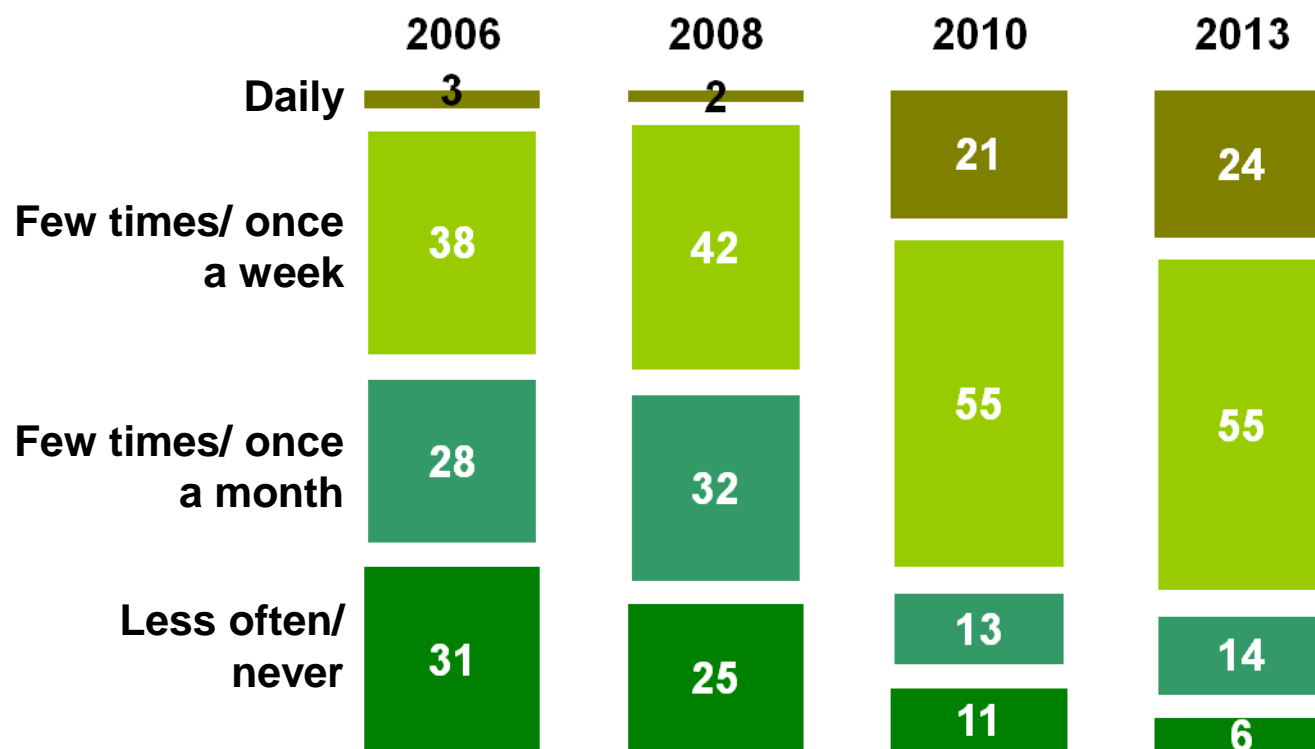


Sweden ranks fourth in terms of the overall importance placed on buying local food. France (73%), ROI (70%) and Spain (63%) lead the way.

Compared to 2008, the frequency of buying local food on a daily basis has improved considerably. Less often than monthly/never purchases are at an all time low.

20

Frequency of 'Local' Food Purchases



Sweden has the highest proportion claiming to buy local food products on a daily/ weekly basis. It also has the lowest proportion who are buying local less often than monthly/never.

In Sweden, 'local food' is most likely to be considered as food that is made in close proximity to where one lives.

21

The majority believe that local food is food that is...

58%

... made within close proximity to where I live

44%

... made within a 20 mile radius from where I live

Much less believe local food to refer to food that is ...

27%

... available in farmers' markets

26%

... made within the province I live

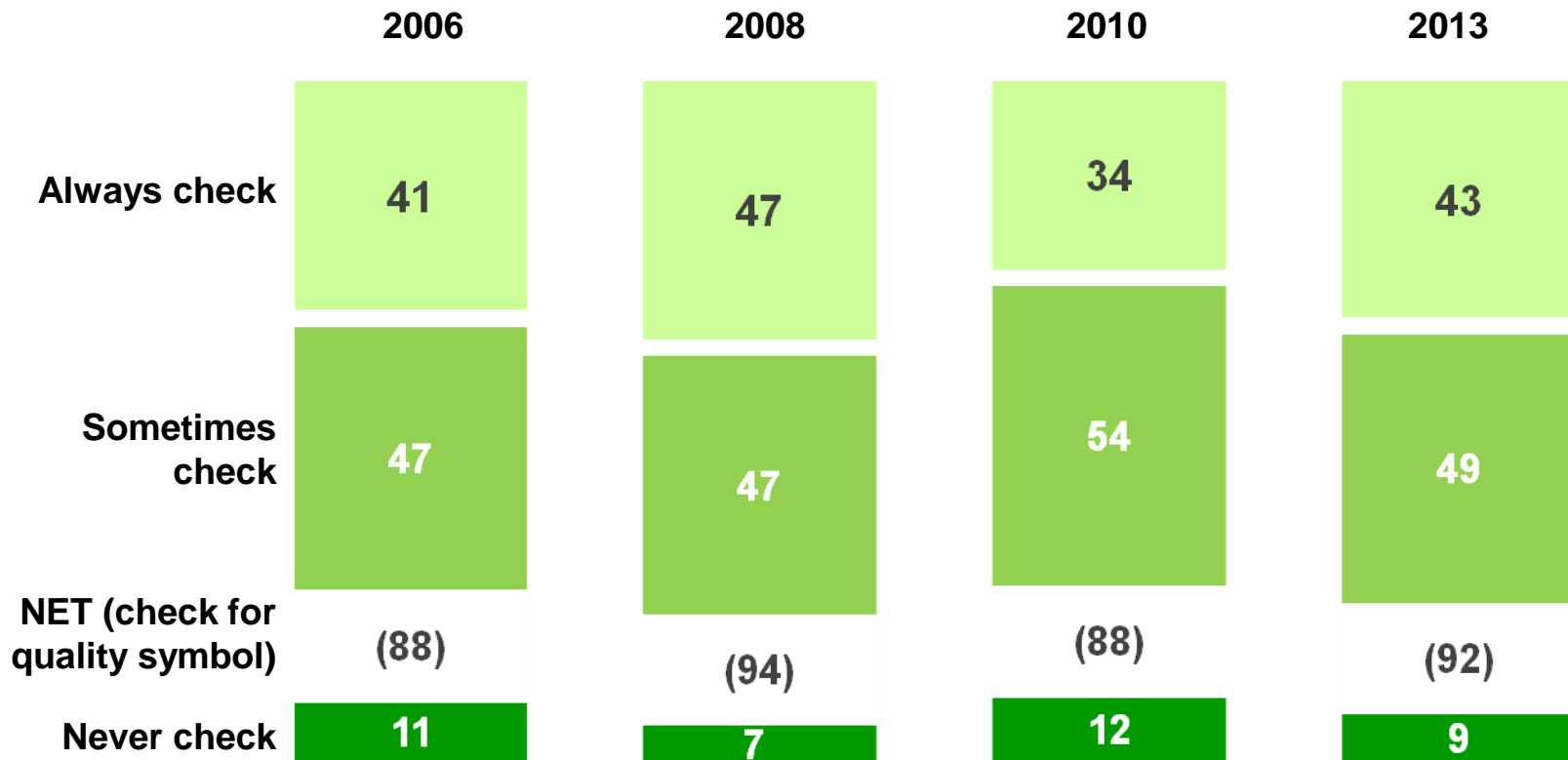
25%

... made within the county in which I live

Checking for country of origin is an extremely popular behaviour in Sweden. The proportion claiming to always check this information has risen since 2010.

22

Checking for Country of Origin label

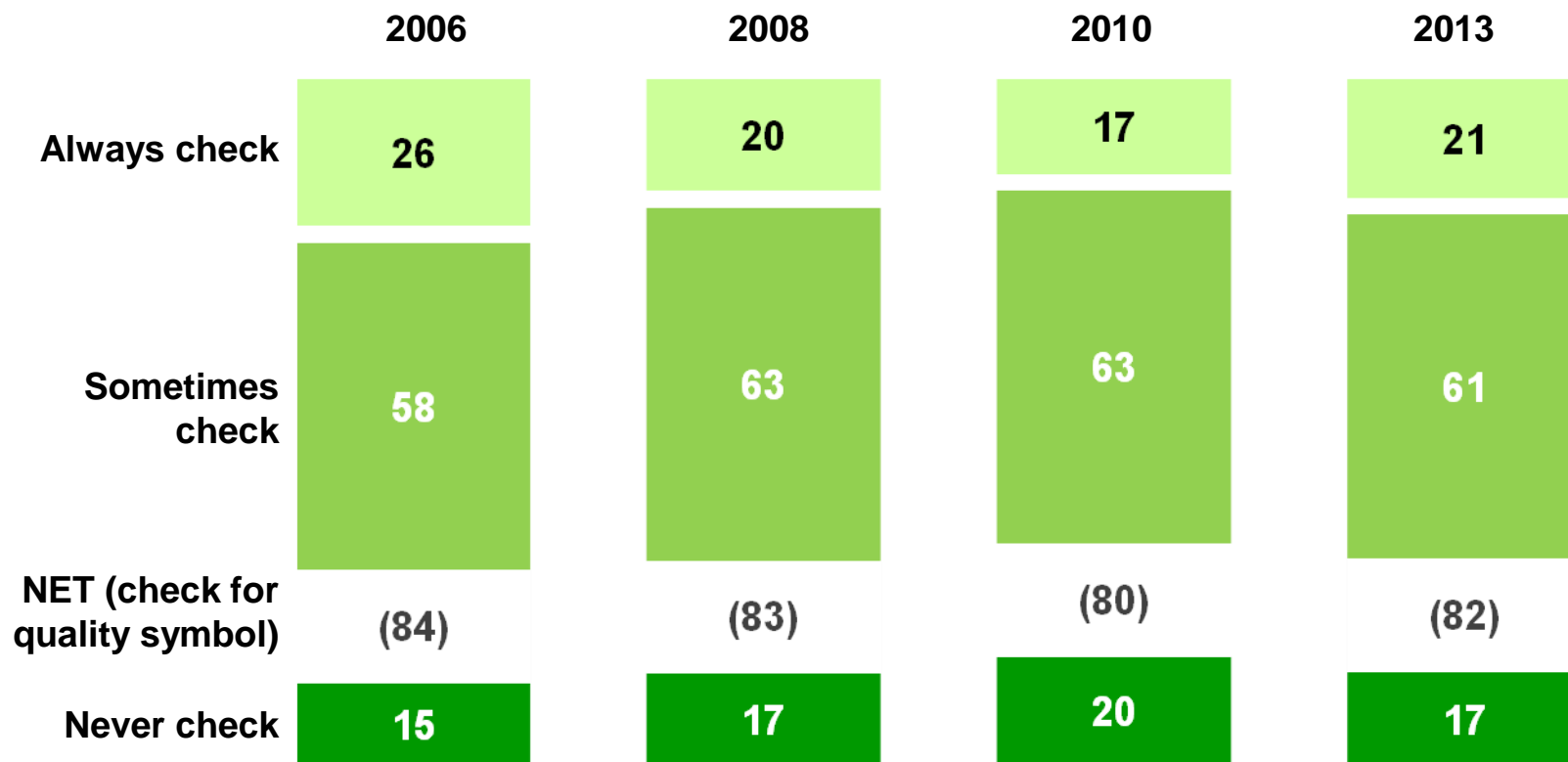


Checking for country of origin is strongest in Sweden. Germany (85%) and Spain (84%) rank second and third respectively.

Checking for the quality symbol on foods amongst Swedish grocery shoppers has remained relatively stable in recent years.

23

Checking for Symbol of Quality label



When it comes to checking for the quality symbol on food products, Sweden & Spain rank joint first.

Sweden continues to place strong emphasis on eating dinner together as a family with more than nine in ten agreeing that this is an important practice.

24

% applies that *'it is important to spend time over dinner as a family'*



Spending time eating dinner together as a family is important in all countries, with over ninety per cent agreement in six out of ten territories.

Food & Sustainability

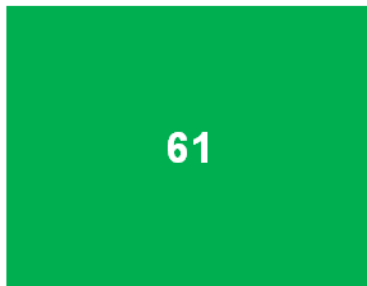


Awareness of food miles is improving in Sweden. In 2013, over one quarter of all adults claim to buy foods with low food miles.

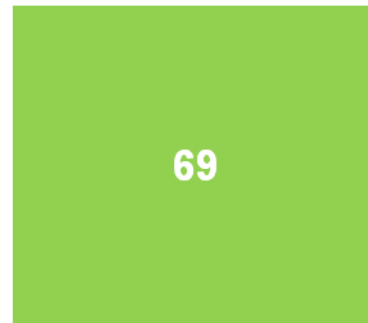
26

% never heard of food miles

2008



2010



2013



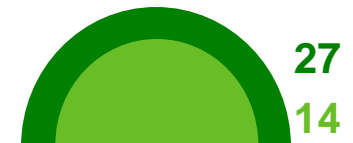
% who buy
foods with
low food
miles



2008



2010



2013



TOTAL % who buy foods with low food miles



% who sometimes try to buy food with low food miles

Sweden ranks fifth overall for purchases of foods with low food miles . Yet, its awareness levels of food miles is not as advanced as other countries.

Awareness of sustainability in Sweden has improved since 2010. However, the proportion of people buying 'sustainable' foods is still below 2006 levels.

27

% never heard of sustainability

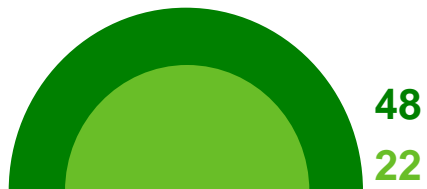
2008

2010

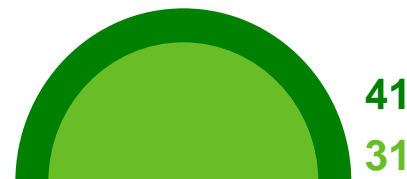
2013



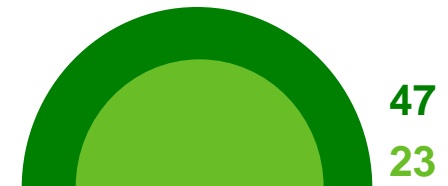
% who buy foods with sustainable features



2008



2010



2013



TOTAL % who buy foods with sustainable features



% who sometimes try to buy food with sustainable features

Sweden ranks sixth for awareness of sustainability and is in the top five for its level of 'sustainable' purchases.

Awareness of carbon footprint has improved, as has the level of low footprint purchases. Active purchasers of low footprint foods has improved since 2010.

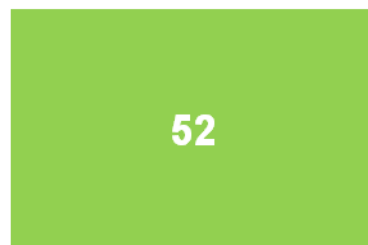
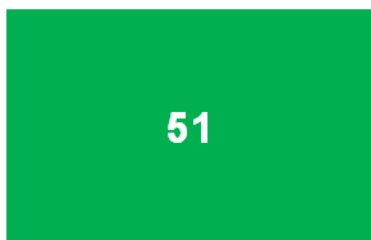
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% never heard of carbon footprint

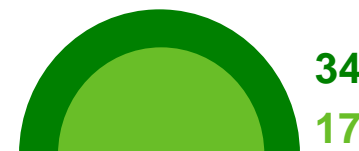
2008

2010

2013



% who buy
foods with
low carbon
footprint



2008

2010

2013



TOTAL % who buy foods with low carbon footprint



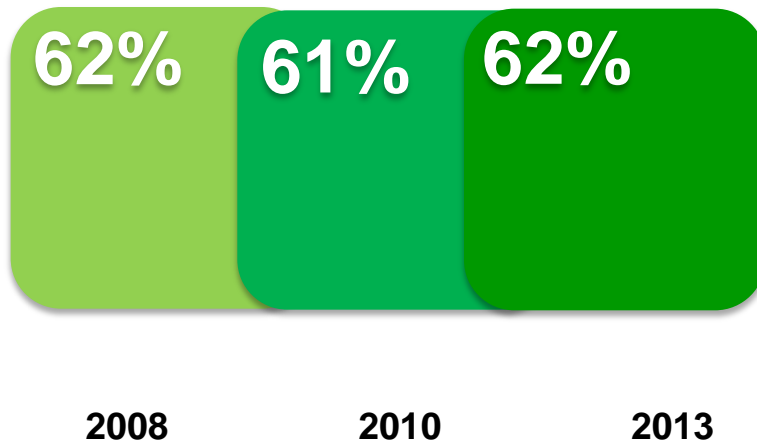
% who sometimes try to buy food with low carbon footprint

Sweden's awareness of carbon footprint ranks amongst the bottom four. In contrast its purchases of these products are amongst the highest.

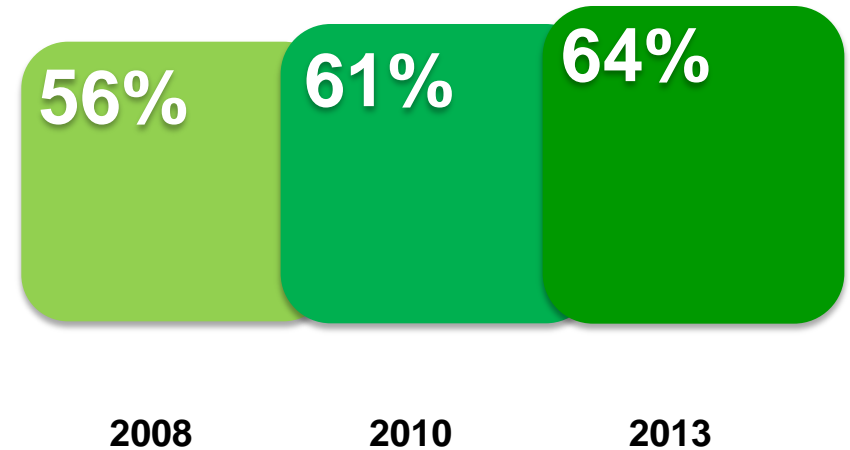
Consciousness of environmental issues in terms of product choice and company selection, have maintained relative stability in recent years.

29

**% who agree that they are more
conscious of environmental issues in
their choice of products**



**% who agree that they prefer to buy
from companies that are aware of the
impact of environmental issues**

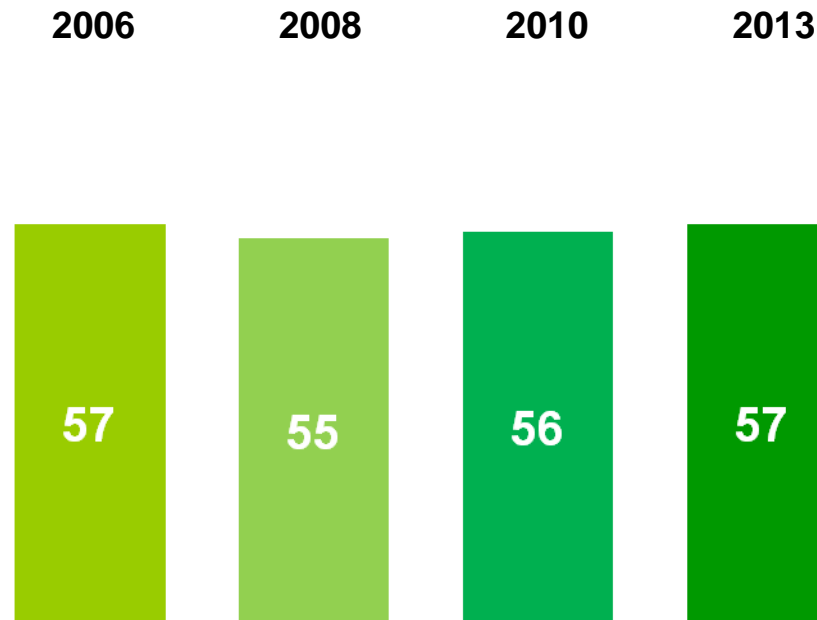


Sweden is amongst the countries with the highest consciousness for environmental issues in product choice and the highest preference for buying from environmentally aware companies

Buying in smaller packs to avoid waste is a behaviour that more than half of the grocery shopper population in Sweden can resonate with.

30

% applies that they *'buy food in smaller packs because it means less waste'*

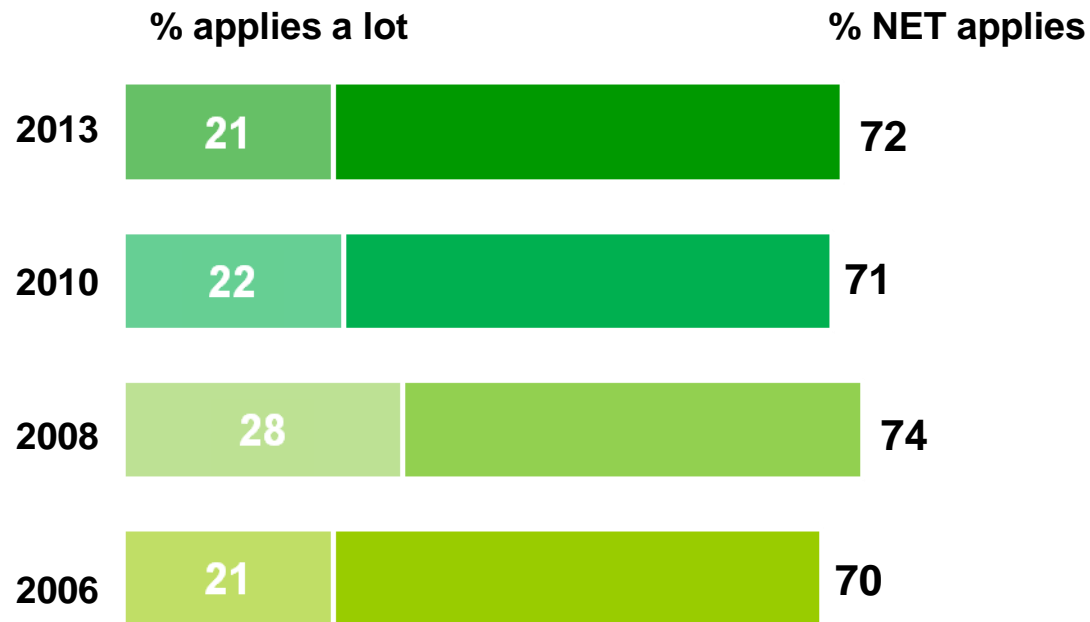


The Germans (81%) are the most conscious when it comes to cutting down on food waste while the Swedes rank joint sixth alongside Belgium, NZ and France.

In Sweden, efforts to buy Fair Trade have not picked up since 2006.

31

I try to buy Fair Trade products/brands whenever they are available



Spain (83%) claim to try to buy Fair Trade products the most while the Sweden rank second.

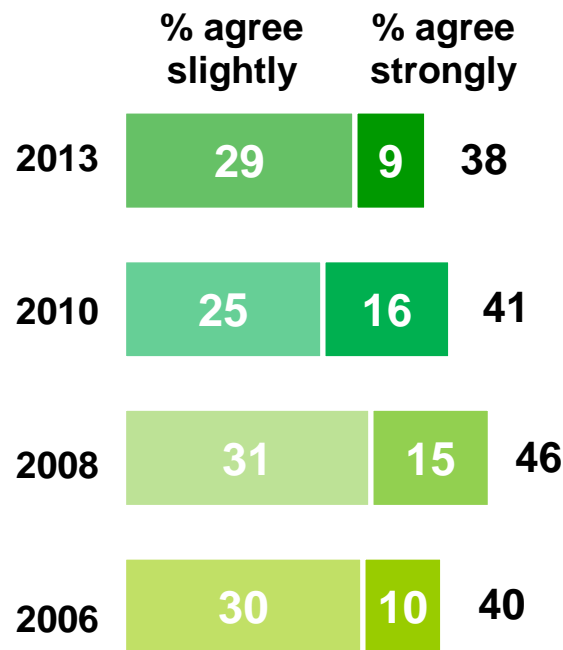
Shopping Around



The proportion of grocery shoppers in Sweden who look for price as the 'first thing' when they are grocery shopping has declined steadily since 2008.

33

When I shop the first thing I look for is price

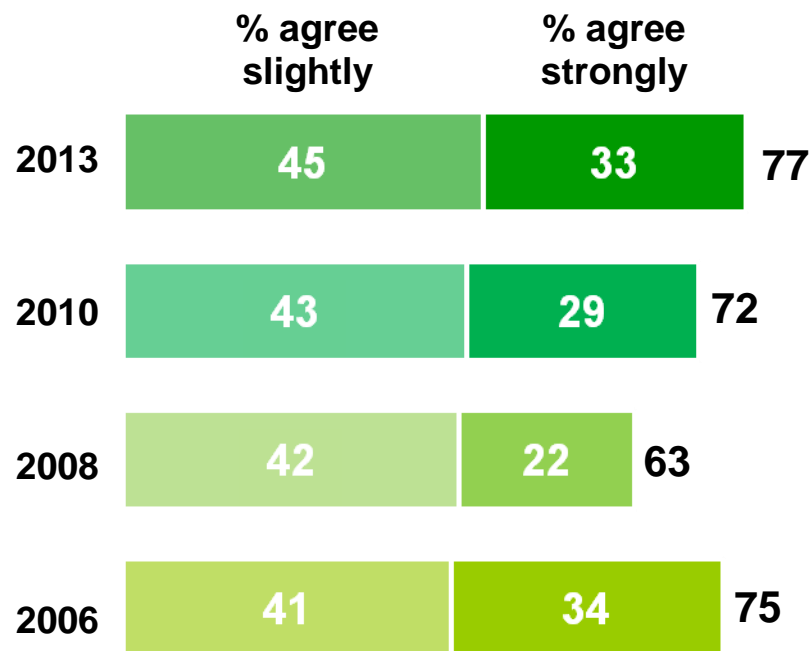


Looking for price as a 'first thing' is a less defining shopping behaviour in Sweden than in any other country. It is a much more popular shopping behaviour in NZ (68%) and ROI (64%).

More than three quarters of grocery shoppers in Sweden consider quality to be more important than price. This is considerably higher than in 2008.

34

Quality of fresh food is more important than price

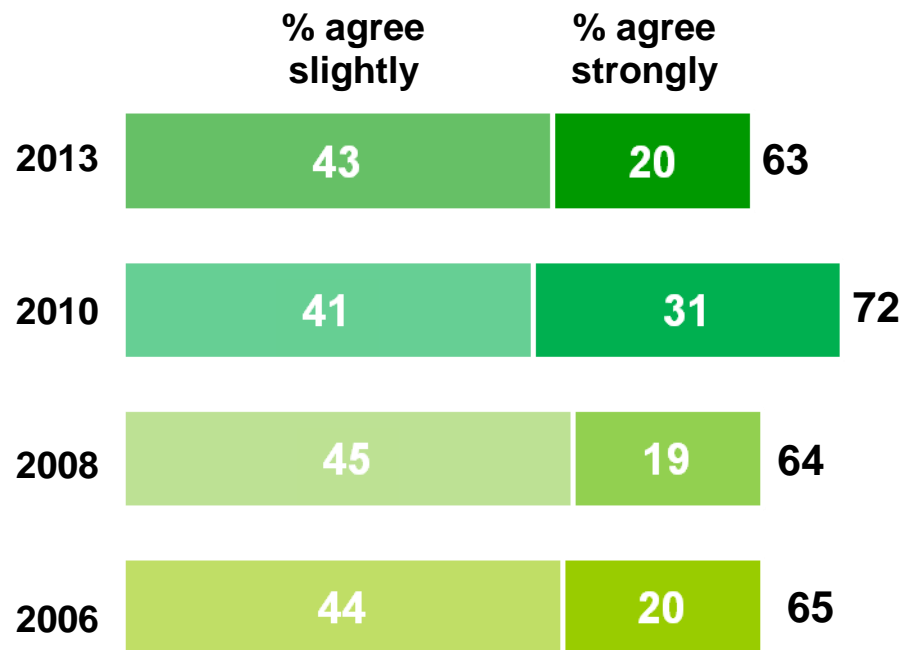


Sweden and ROI (79%) place the most importance on the quality of fresh food being more important than price.

Getting value for money in the same store is important for just over six in ten grocery shoppers. It is a practice that has decreased in popularity since 2010 however.

35

I most often go to the same store but look for the best value for money I can get

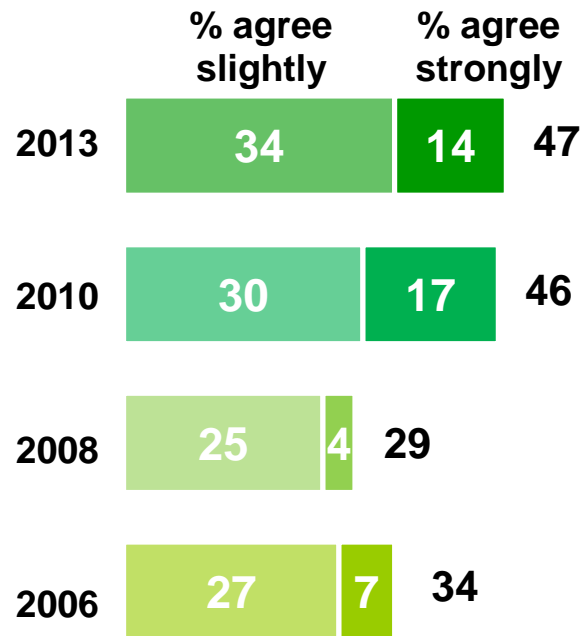


Sweden rank in the bottom two when it comes to assertions that they are looking for the best value for money they can get.

Just under half of all grocery shoppers in Sweden agree that they would pay a bit more for grocery shopping to get superior customer service a much improved level on 2008.

36

I will pay a bit more for grocery shopping to get superior customer service

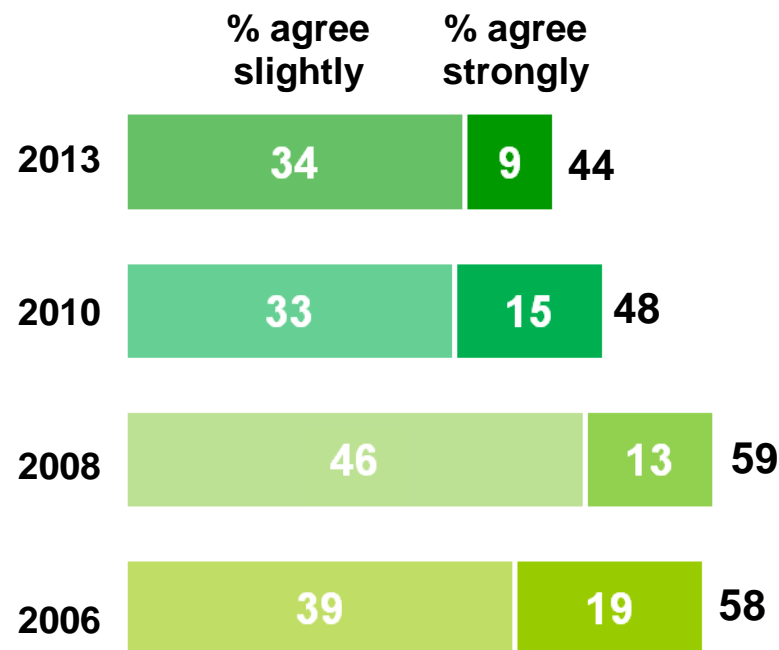


Willingness to pay more for customer service is highest in Spain (48%) and Sweden.

Just over four in ten Swedish grocery shoppers agree that they tend to buy on impulse when products are cheap. This behaviour has fallen compared to 2006 and 2008.

37

I tend to buy on impulse if I think products are cheap

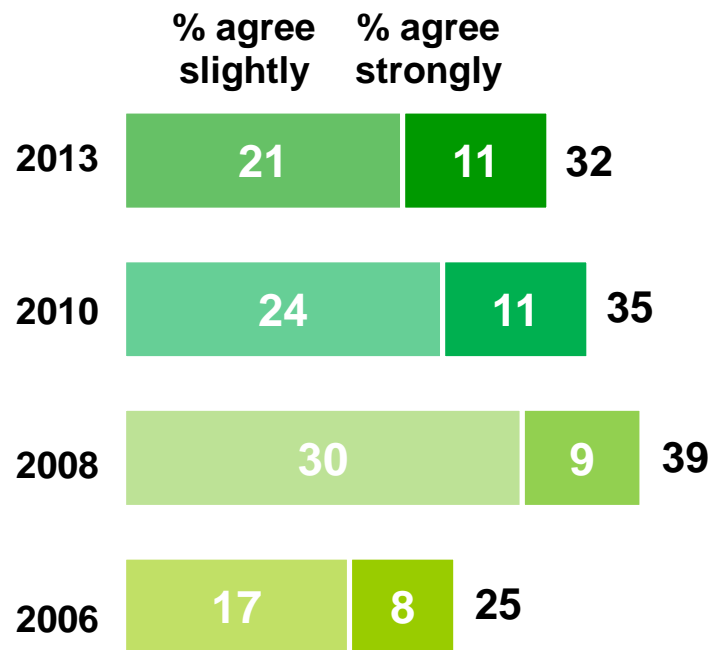


GB considers itself to be the most impulsive (54%) while France is the least (17%). Sweden ranks eight overall.

Spending time looking for a bargain is a shopping behaviour that has been declining amongst Swedish grocery shoppers since 2008.

38

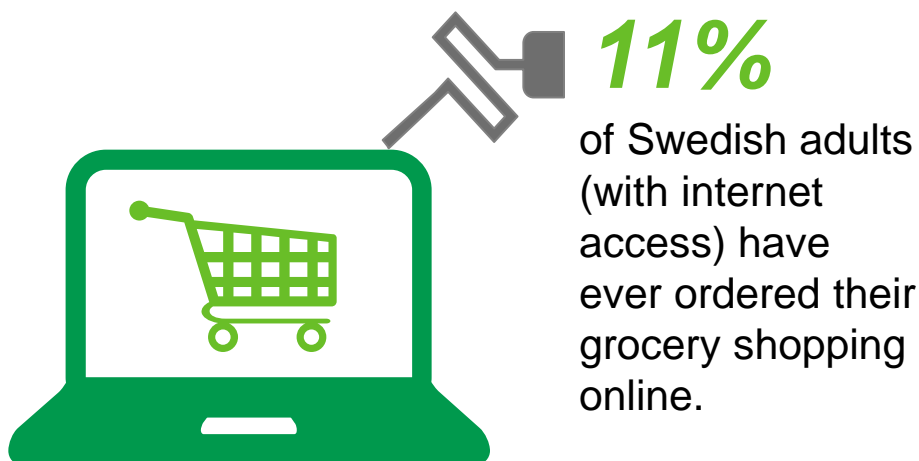
I don't mind spending time looking for a bargain



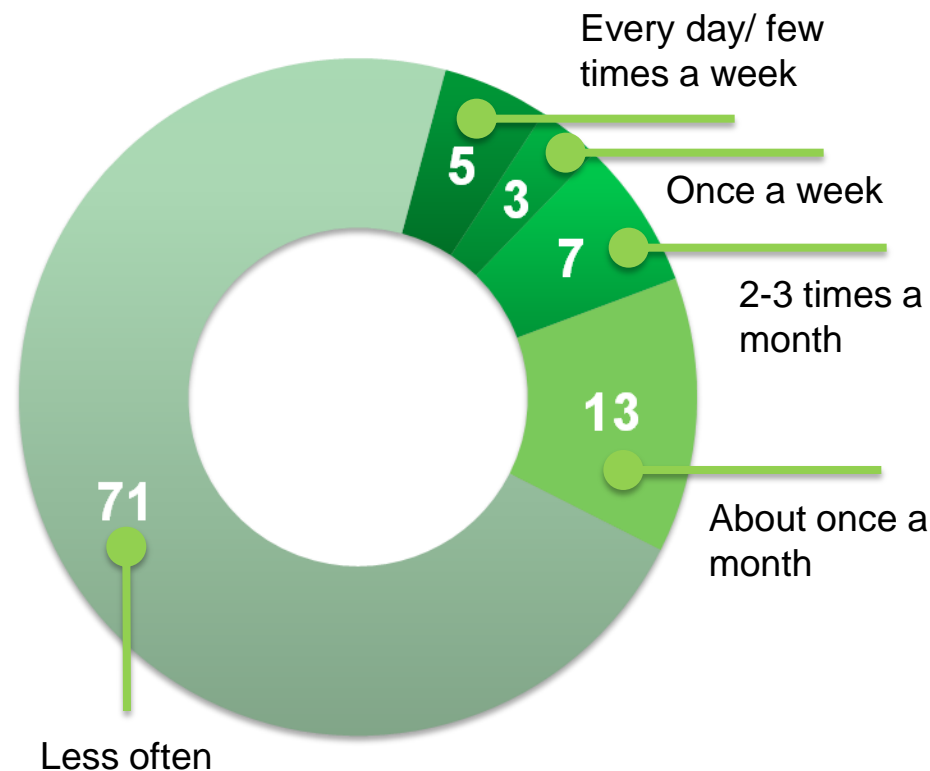
Sweden and France display the lowest willingness to spend time looking for bargains. The US are the biggest bargain hunters (63%).

Approximately one in ten adults in Sweden have ordered their grocery shopping online. Less than thirty per cent of these shop more than once a month or more often.

39



How often have they ordered their grocery shopping online?



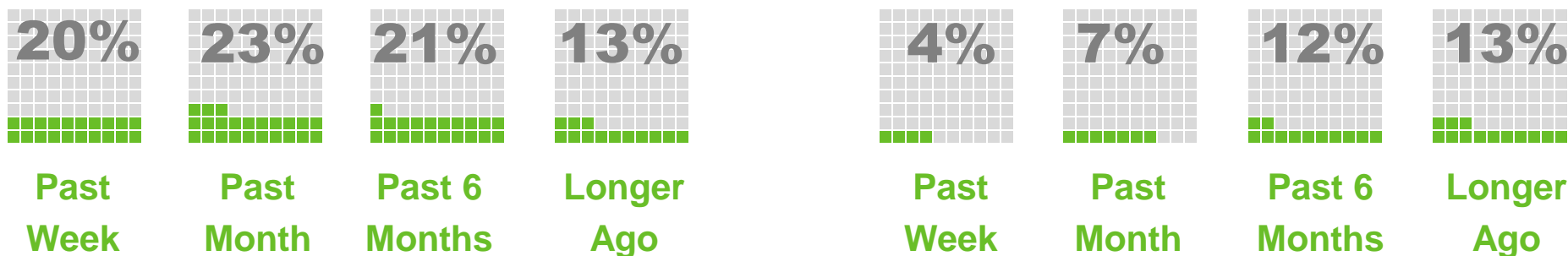
Sweden ranks among the bottom five for people who have ordered their shopping online. Its frequency of online grocery purchases is amongst the lowest alongside NZ and ROI.

In Sweden, using the internet to access recipes is a very popular behaviour. More than a third have downloaded a mobile phone food app.

40



Most recent download activity



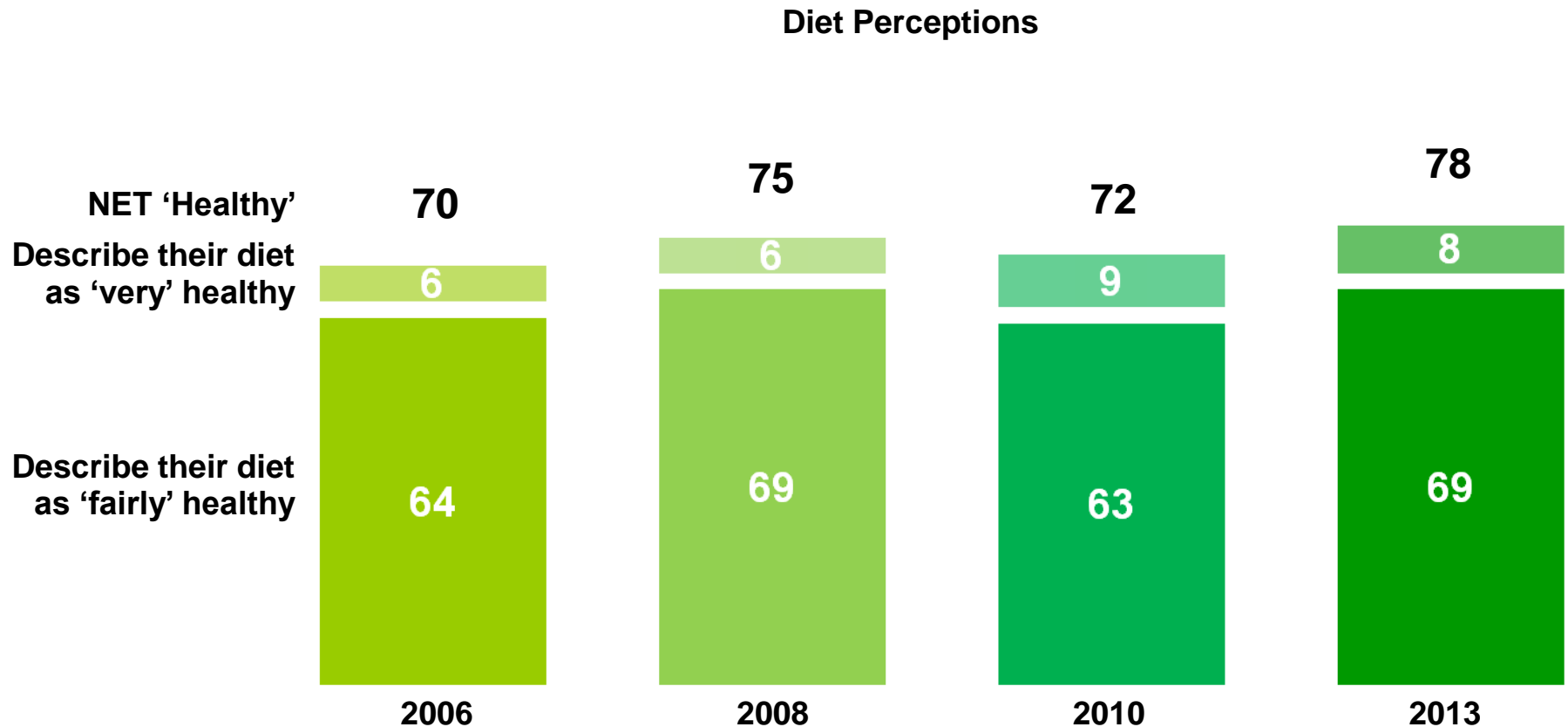
Sweden ranks second overall for the percentage of people who have downloaded a recipe, it boasts the highest proportion of those who have downloaded a Food App.

Health & Wellbeing



Almost eight in ten Swedish adults consider their diet to be healthy. Perceptions of health in Sweden have risen from 2006 levels.

42

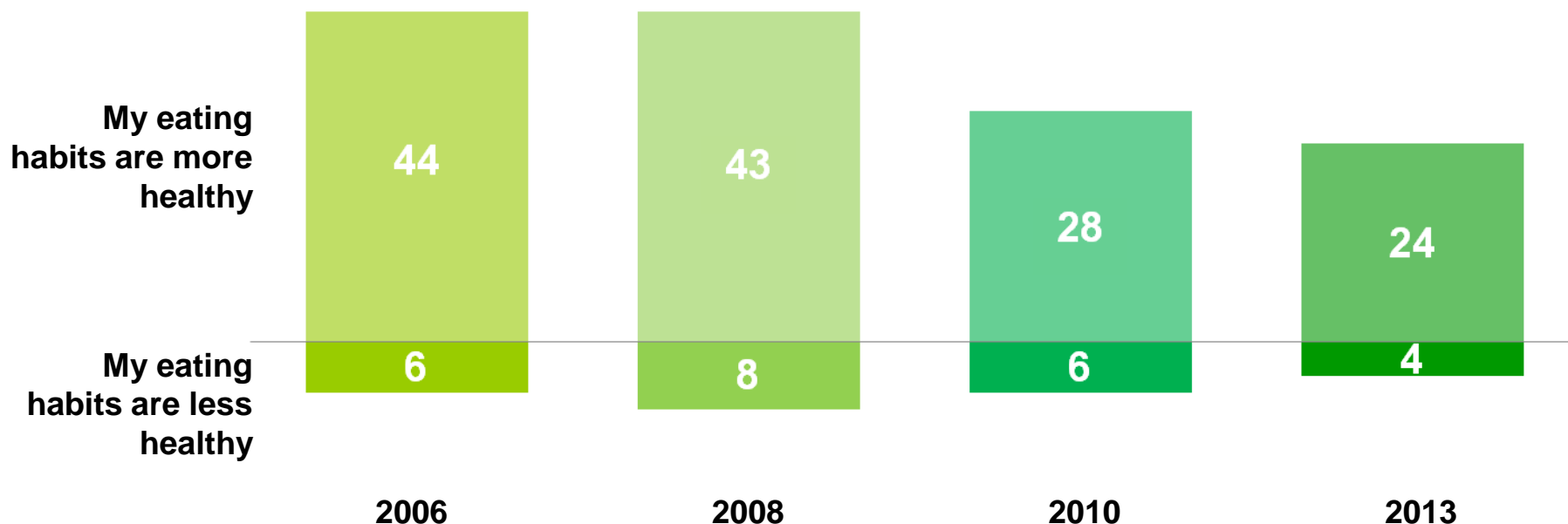


Sweden is positioned third, alongside GB and Spain, when it comes to perceptions that its diet is 'healthy'.

The majority of adults in Sweden have maintained the same eating habits as 12 months ago. The proportion eating 'more healthy' has declined substantially since 2008.

43

Changes in eating habits in last 12 months

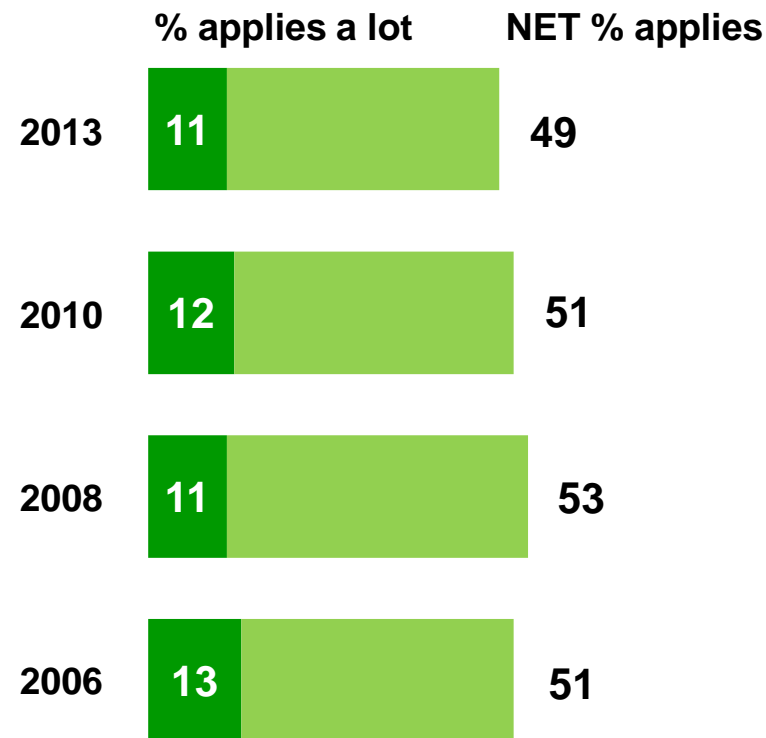


Sweden and GB display the lowest proportion of people who are claiming to eat more healthy than 12 months.

Eating 5 portions of fruit and veg each is an endeavour undertaken by almost half of all adults in Sweden.

44

I eat at least 5 portions of fruit and veg per day



Of all countries surveyed, Sweden displays the lowest efforts to eat the recommended '5 a day'.

High-fibre foods are consumed much less than fruit and veg in Sweden. Nine in ten Swedish adults claim to be making efforts to always eat a balanced diet.

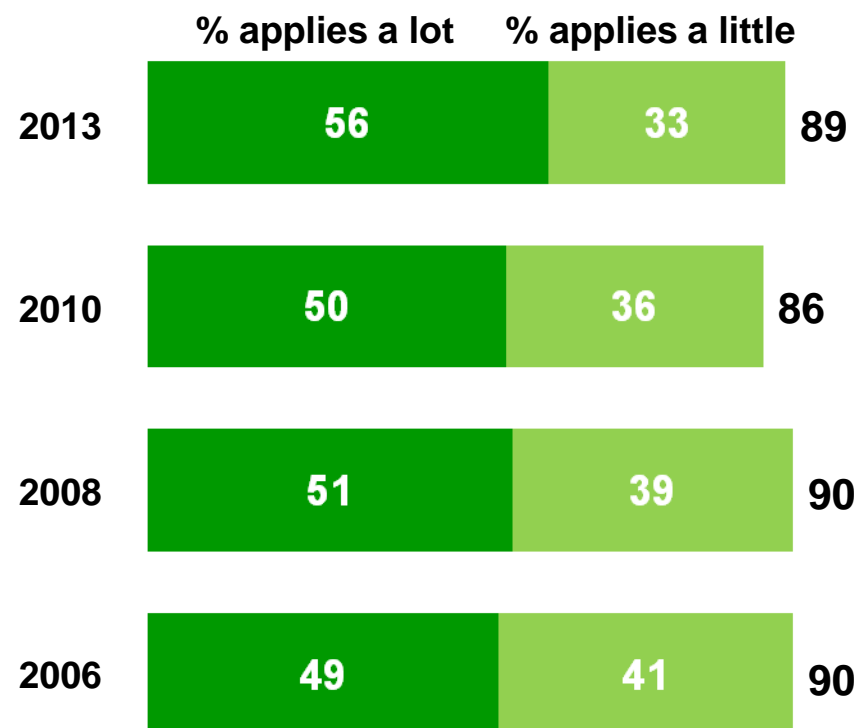
45



Almost nine in ten Swedish adults claim to be trying to limit the amount of fast food that they consume; a figure that has remained unchanged since 2006.

46

I try to limit the amount of fast food that I consume

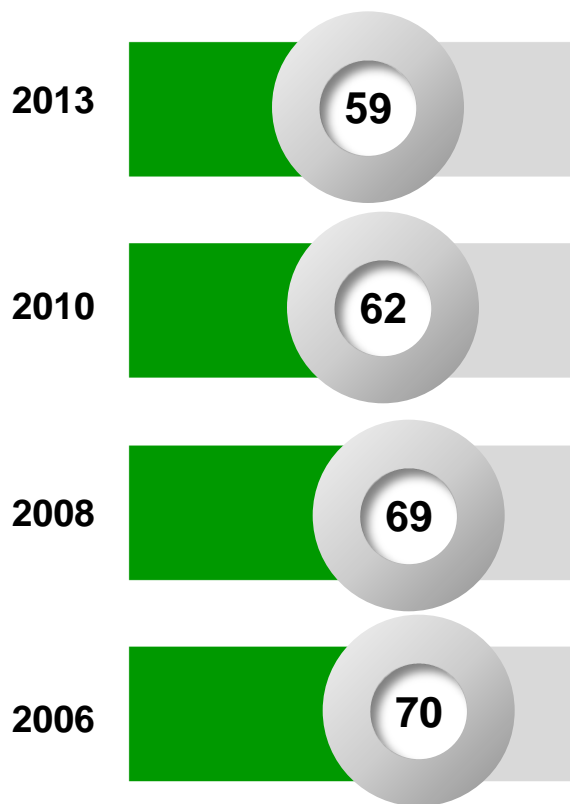


Efforts are being made in all countries to reduce the amount of fast food that is eaten.
Sweden ranks closely behind Spain (94%) and Belgium (92%) in third position.

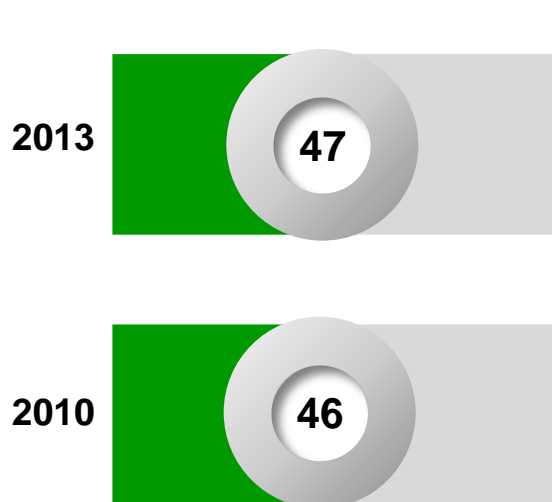
Sweden's belief that low fat equates to the healthy choice has declined considerably. Yet, almost six in ten still claim to always look for the 'low fat' option when they shop.

47

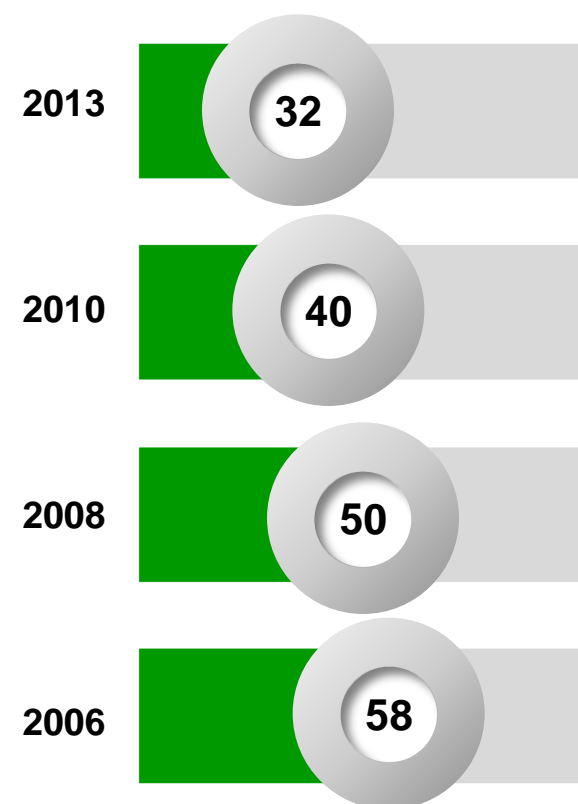
% applies that 'always look for low fat options when buying food products'



% applies that they 'think of the calories in what they eat'



% applies that 'if a label says 'low fat/reduced fat' then the product will always be the healthy choice'

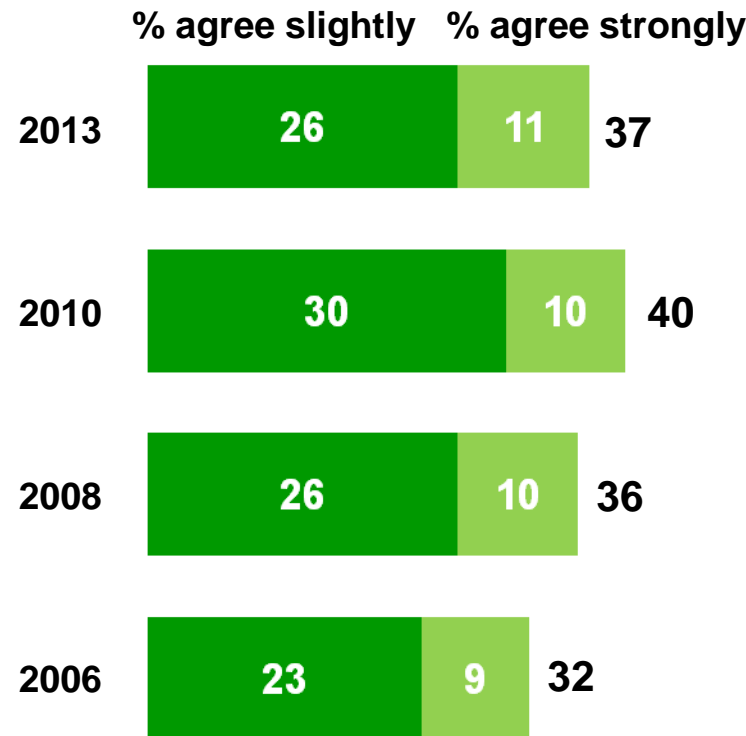


Sweden are amongst the least likely to look for low fat food options. They rank last regarding the association between low fat and healthy and their consideration of calories is lower than all countries, except Germany.

Concerns about children becoming obese have increased slightly on 2006 levels, however, the perception who have strong concerns has not changed significantly.

48

I am concerned about my children becoming obese



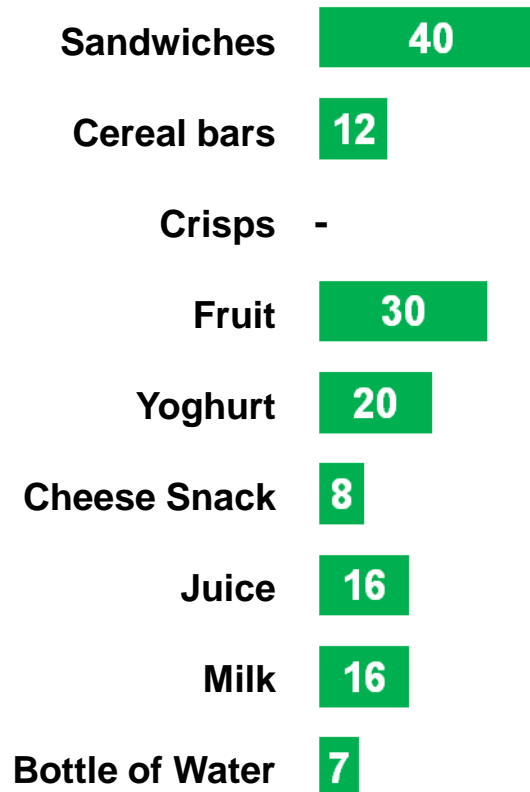
The lowest levels of concern regarding obesity amongst children are in the Netherlands and ROI & GB (31%). Sweden ranks sixth.

Sandwiches and fruit are the most popular components to be included in kids' lunchboxes. In terms of drinks, juice and milk are more popular than water.

49

Content of kids' lunchboxes

2013

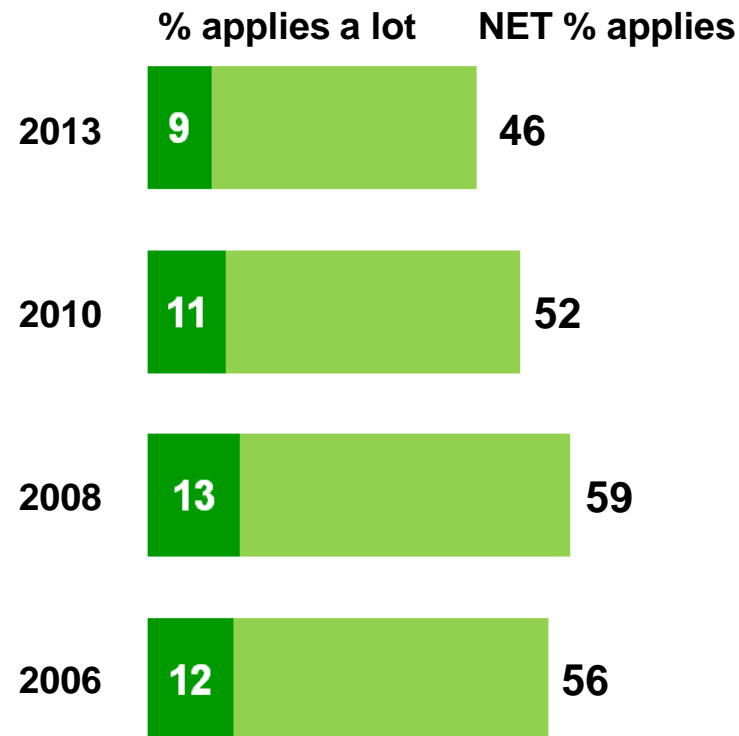


The inclusion of sandwiches, fruit and cheese snacks in the lunchboxes of children in Sweden are amongst the lowest of all the countries surveyed.

In Sweden, negative associations whereby healthy food is seen as limiting and boring have been declining steadily since 2008.

50

Choosing healthy food to eat is limiting and boring

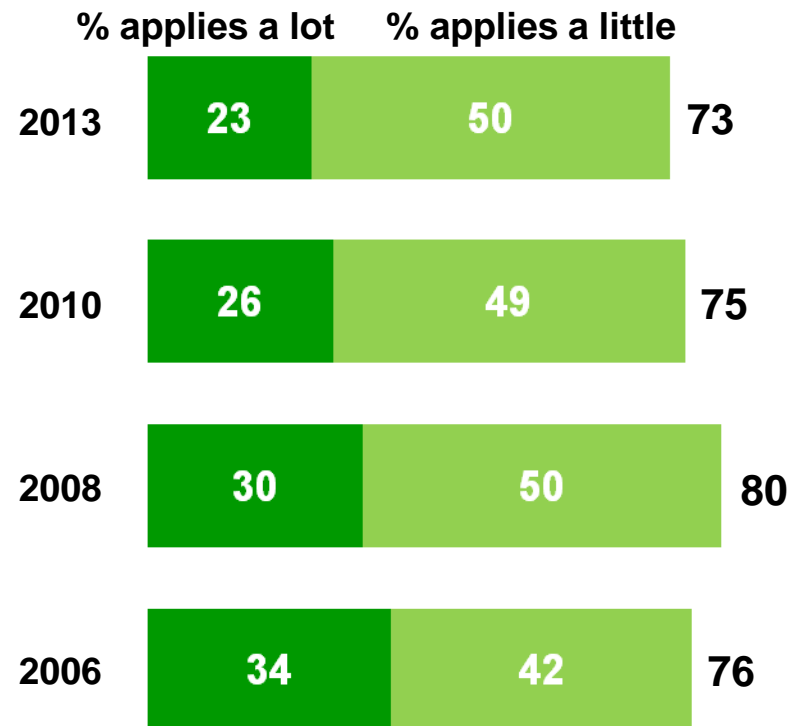


Sweden ranks joint sixth with Belgium, in terms of believing that choosing healthy food is limiting and boring.

Similar to 2010, just over seven in ten Swedish adults would like manufacturers to help them to eat healthy.

51

I would like manufacturers to help me to eat healthy

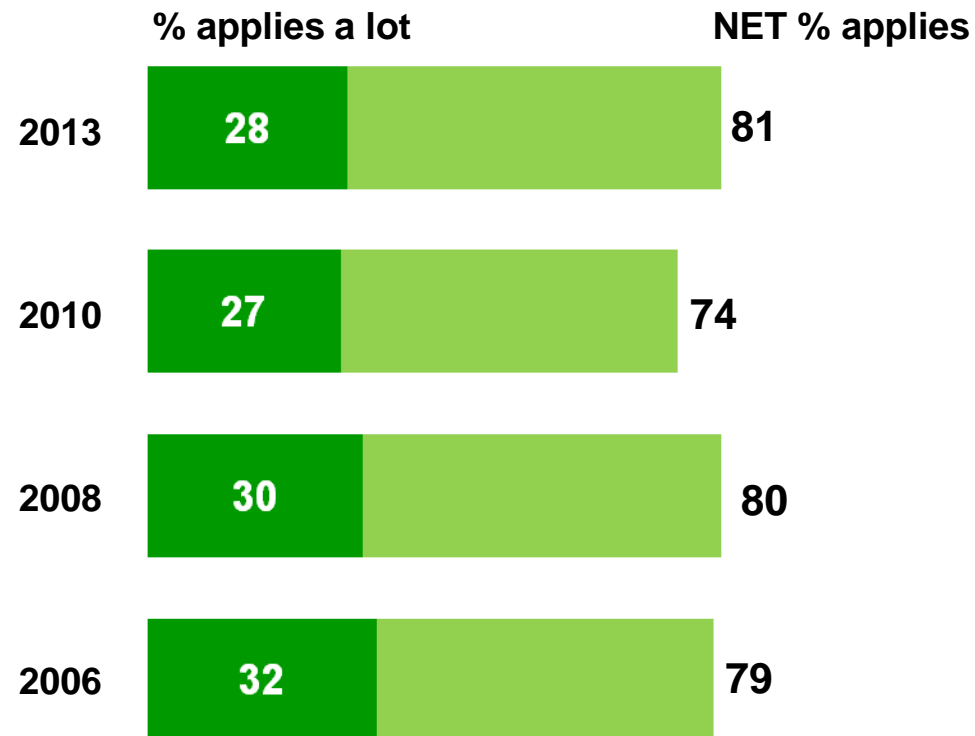


Compared to countries like Spain (94%) and Germany (88%) Sweden's desire to have manufacturers help them to eat healthy is less deep rooted.

Willingness to pay a premium for healthy foods and beverages in Sweden has increased to over eight in ten grocery shoppers.

52

I am willing to pay a bit more for healthy food and beverages (as long as they taste good)

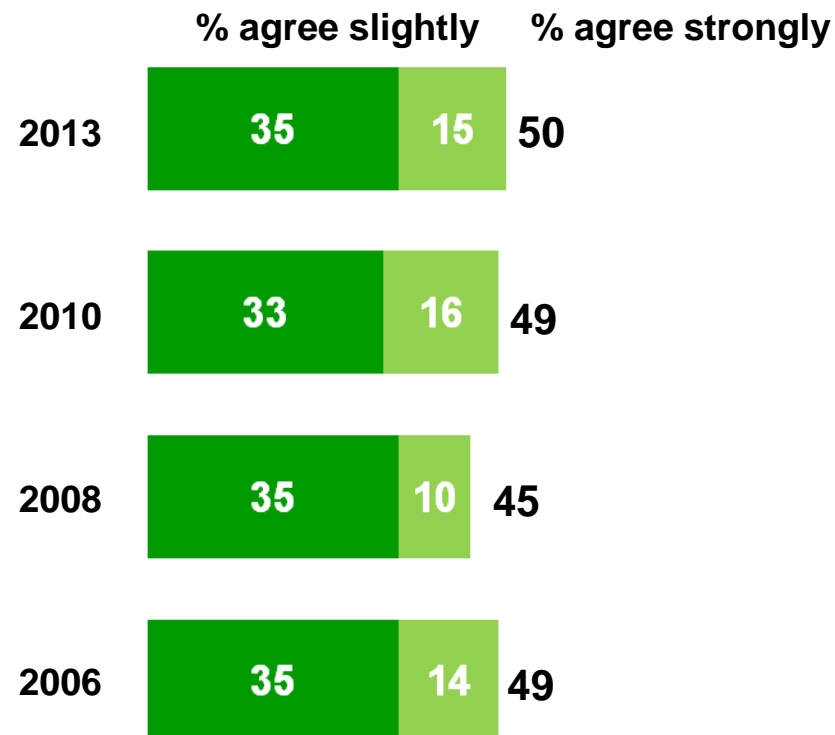


There are six countries in which more than 70% of adults are willing to pay more for healthy food and beverages. Sweden ranks second overall.

Half of Swedes agree that they eat healthy to take control of their lives. This finding is consistent with results eight years ago.

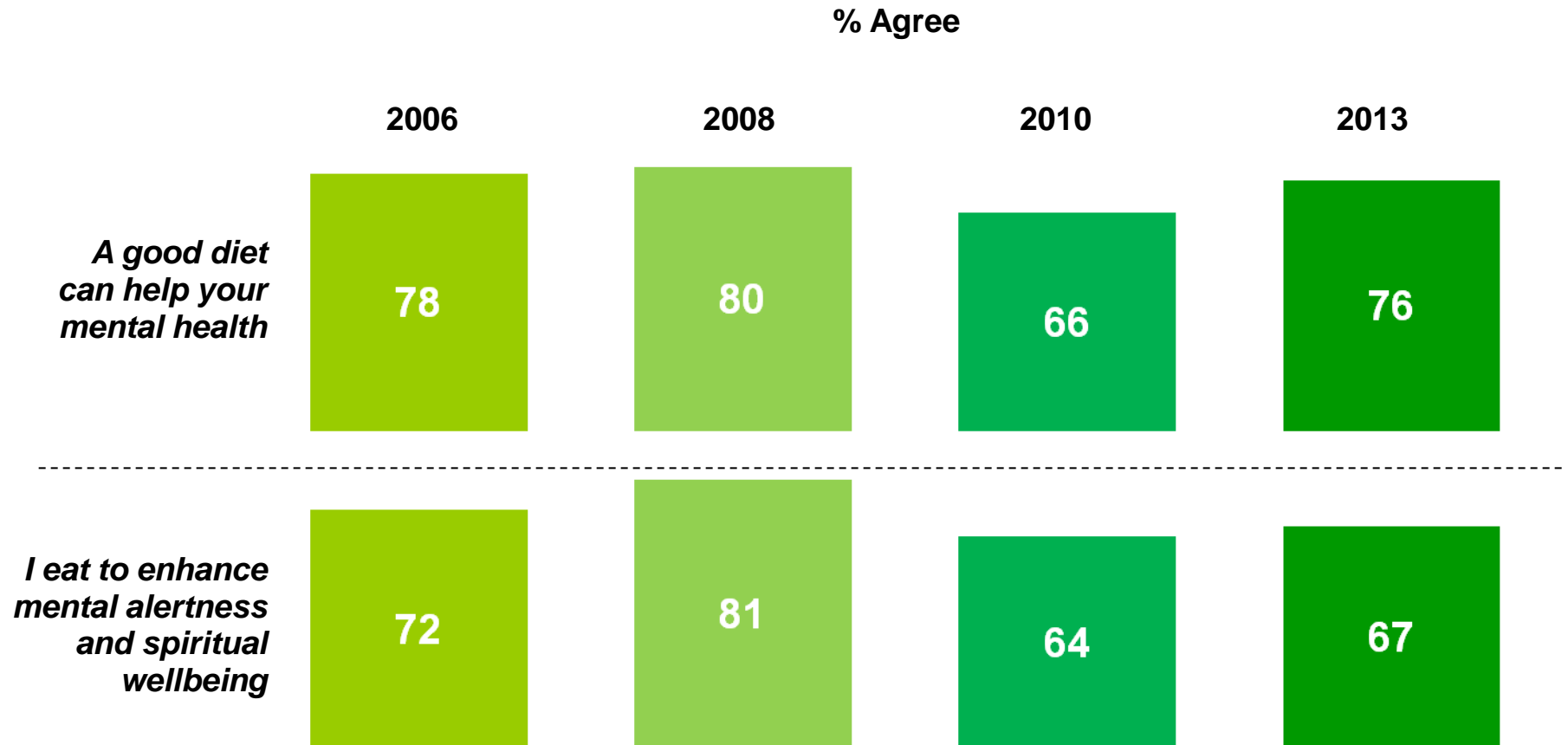
53

I eat healthy to take control of my life



Eating healthy to take control of one's life is least popular in Sweden. France ranks first (69%).

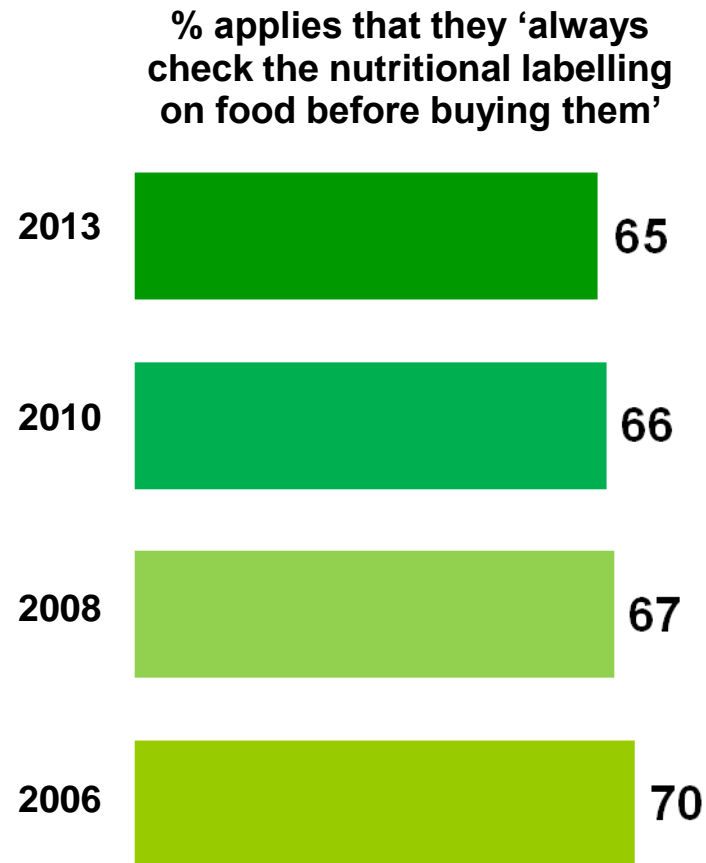
Compared to 2008, Sweden is showing less support for the concept that diet can help mental health and that food can enhance mental alertness and spiritual wellbeing.



Compared to each of the other countries in the PERIscope 2013 study, Sweden displays lower support for the ideas that a good diet can help mental health or that they eat to enhance their spiritual wellbeing.

Checking the nutritional labelling on food prior to purchase is done by almost two thirds of Swedish grocery shoppers; a behaviour that has been falling since 2006.

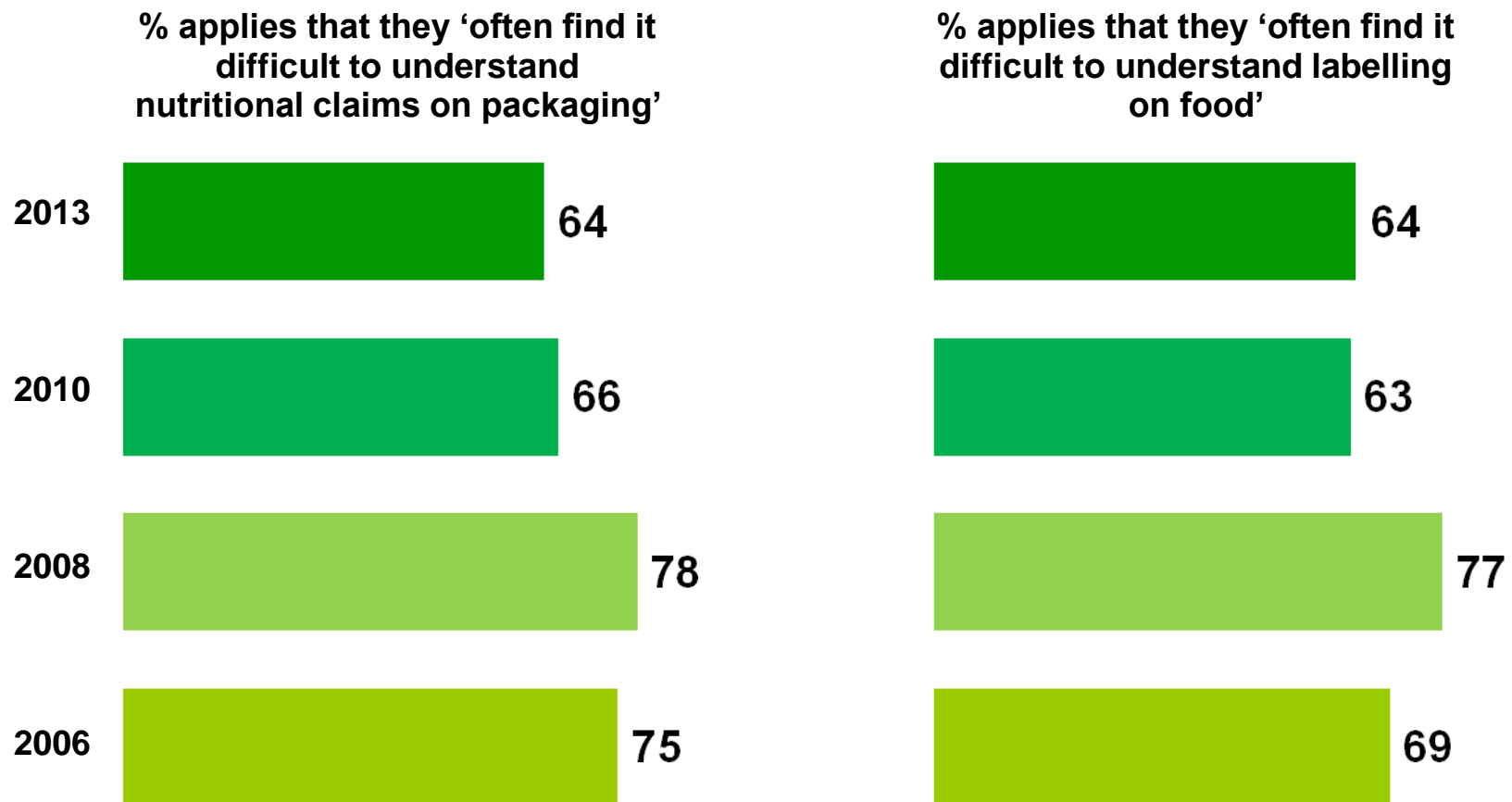
55



Compared to other countries, Sweden display an average tendency to check the nutritional labelling on food prior to purchase.

Since 2008, the Swedish are finding it slightly easier to understand nutritional claims and food labelling. However, difficulties still exist amongst more than six in ten adults.

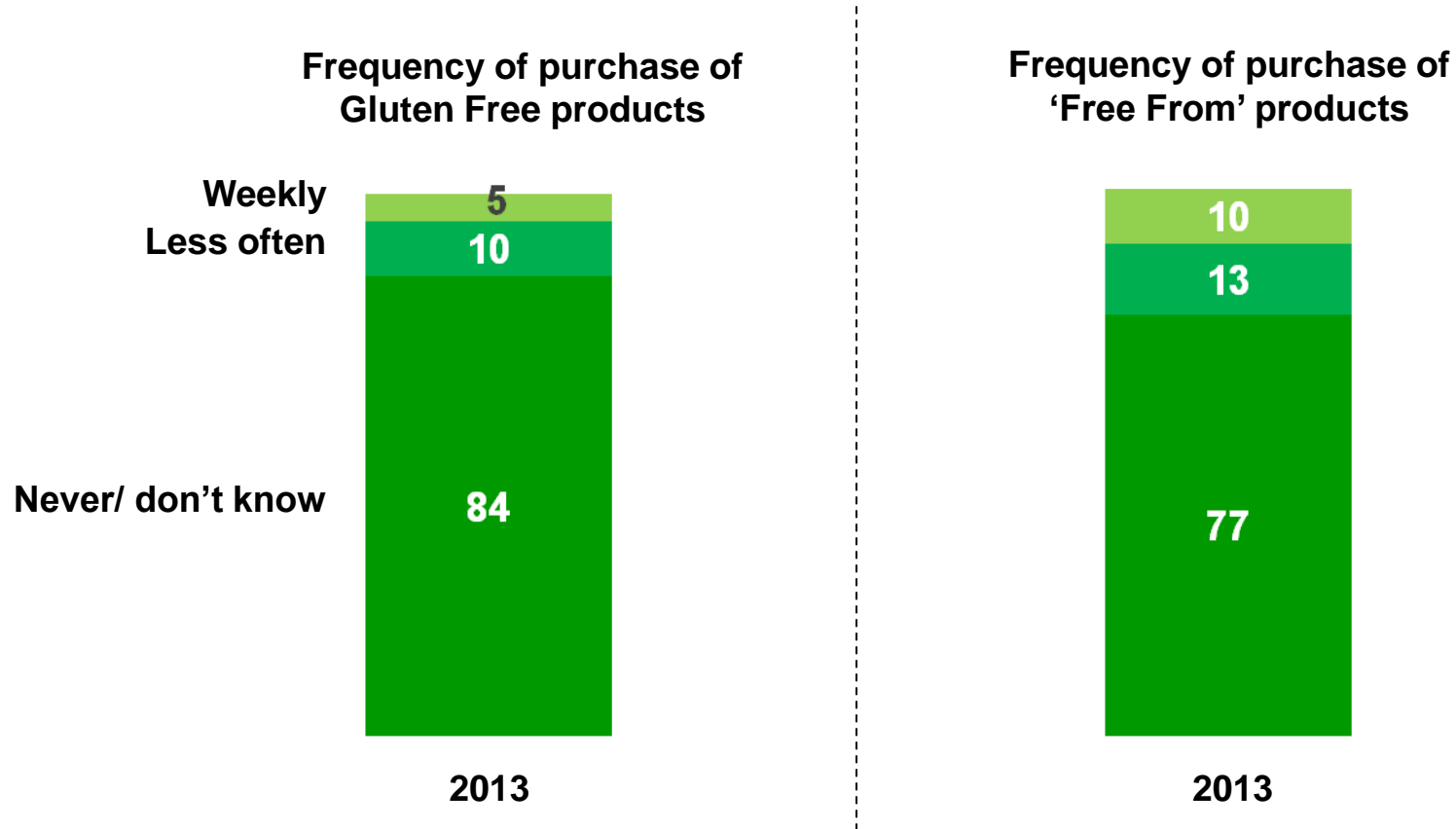
56



For understanding both nutritional claims and food labelling, Sweden displays average levels of difficulty. It is considerably less confused than Spain and not as at ease as the US.

The majority of Swedish adults are either unsure or have never purchased either gluten free or 'free from' food products.

57



Across the PERIscope 2013 study, Sweden ranks fourth for purchases of gluten free and 'free from' products.

TAKEAWAYS



1

Good food, home food, best food

- Highly positive and passionate about food with high levels of culinary expertise.
- Committed scratch cookers likely to reject convenience meals & ready prepared products. Fast food must be good food
- Negative opinions about convenience means they will put in more effort.
- Use technology to advance skills and enhance fun.



#2

True to home

- Strong buy-in to concept of local.
- Engaged and responsive to 'local' message and 'local' products.
- Highly committed to home brand (country of origin) also.
- Food quality is paramount. Quality is delivered through home-grown/local concept.
- Providence can command a premium.



#3

Uncompromising shoppers

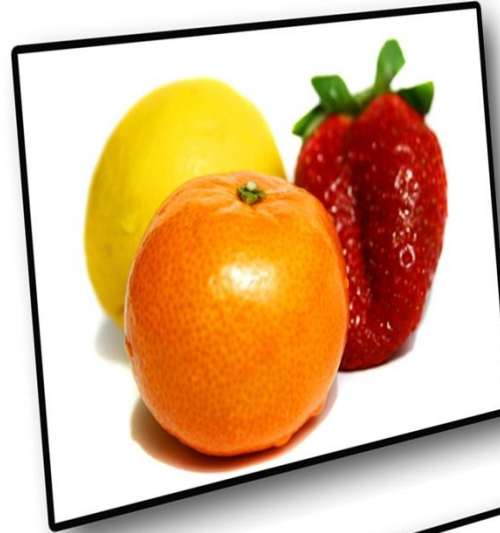
- Demand for quality far outweighs concerns for price, value, bargains or deals.
- Shoppers are focused, unwavering and vigilant.
- Willingness to pay more for more (customer service, quality products, healthy products).
- Unlikely to react to price based offers but may be influenced by premium options.



#4

Cynical health seekers

- Active desire to maintain a healthy diet.
- Strong willingness to pay more for healthy food.
- Cynical about 'low fat' claims, a reliance on calorie counting, connections between diet and mental health/ wellbeing/ alertness etc.
- Keen to define their own version of healthy.



#5

Environmental blinkers

- High levels of awareness and appreciation re: Fair Trade/ environmental products /environmentally aware companies.
- Low levels of awareness regarding specific issues (carbon footprint, sustainability, food miles.)
- Strong potential to build purchases through better awareness as fundamental engagement with other environmental concept exist.



PERIscope2013



Swedish

Consumers & Their Food

